BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

Application of Southern California Edison Company (U 338E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	Application 14-11-007 (Filed November 18, 2014)
And Related Matters.	Application 14-11-009 Application 14-11-010 Application 14-11-011

AMENDED ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2018

EDWARD L. HSU

Attorney for:
SOUTHERN CALIFORNIA GAS COMPANY
555 W. Fifth Street, GT14E7
Los Angeles, CA 90013
Telephone: (213) 244-8197
Facsimile: (213) 629-9620
E-Mail: ehsu2@semprautilities.com

June 28, 2019

BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

Application of Southern California Edison Company (U 338E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	Application 14-11-007 (Filed November 18, 2014)
And Related Matters.	Application 14-11-009 Application 14-11-010 Application 14-11-011

AMENDED ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2018

This report presents the results and expenditures for Southern California Gas Company's (SoCalGas) California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program for Program Year (PY) 2018. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's (Commission or CPUC) Energy Division (ED) with all the necessary information to analyze SoCalGas' low-income programs.

Respectfully Submitted
on behalf of Southern California Gas Company,

By: *\/s/ Edward L. Hsu*
EDWARD L. HSU

Attorney for:
SOUTHERN CALIFORNIA GAS COMPANY
555 W. 5th Street, GT14E7
Los Angeles, CA 90013
Telephone: (213) 244-8197
Facsimile: (213) 629-9620
E-Mail: ehsu2@semprautilities.com

June 28, 2019

Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

Annual Report

2018 Results

May 1, 2019

ENERGY SAVINGS ASSISTANCE PROGRAM AN CARE ANNUAL REPORT

TABLE OF CONTENTS

Title **Page**

1. ESA PROGRAM EXECUTIVE SUMMARY 1

1.1 Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy 2

1.2 Energy Assistance Savings Program Overview 12

1.3 Marketing, Education and Outreach 15

1.4 Energy Savings Assistance Program Customer Enrollment Evaluation 18

1.5 Disability Enrollment Efforts 23

1.6 Leveraging Success Including LIHEAP 28

1.7 Integration Success 36

1.8 Workforce Education & Training 46

1.9 Legislative Lighting Requirements Status 52

1.10 Studies 52

1.11 Pilots 56

1.12 "Add Back" Measures 58

1.13 Low Income Working Groups 59

1.14 Annual Public ESA Program and CARE Meeting 64

1.15 Multifamily Properties 64

2. CARE EXECUTIVE SUMMARY 68

2.1 Participant Information 71

2.2 CARE Program Summary 77

2.3 CARE Program Costs *79*

2.4 Outreach *83*

2.5 Processing CARE Applications *113*

2.6 Program Management *117*

2.7 Pilots *117*

2.8 Studies *119*

3. CARE EXPANSION PROGRAM 119

3.1 Participant Information *119*

3.2 Usage Information *120*

3.3 Program Costs *120*

3.4 Outreach *121*

3.5 Program Management *124*

4. FUND SHIFTING 124

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-02 and D. 17-12-009 ..... *124*

5. COMMONLY USED ACRONYMS 125

6. APPENDIX A: COLLATERAL MATERIALS 127

6.1 ESA Program Tables *127*

6.2 CARE Tables *128*

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

This report provides information on SoCalGas ESA Program[1] accomplishments and expenditures for Program Year (PY) 2018. The ESA Program offers low-income customers weatherization services, energy efficient appliances, and energy education at no cost to qualified natural gas customers within SoCalGas' service territory.

In PY2018, SoCalGas' ESA Program treated 99,457 homes, installing measures providing total energy savings of 1,575,510 first-year therms. The program built upon progress in 2017, continuing to focus on customer segments of highest priority including first-time customers toward meeting the 2020 goal. Retreated or "go-back" homes remained steady at 58,459 homes in 2018, compared to 58,424 in 2017, while first-time treatment homes increased to 40,998 in 2018 compared to 35,366 in 2017. The increase in first-time treatment homes is attributable to SoCalGas' focus on prioritized segments including multifamily and other hard-to-reach customers.

SoCalGas continued to implement initiatives directed in Decision (D.) 16-11-022, D.17-12-009 and the dispositions from SoCalGas Advice Letters (AL).[2] These included:

- Participation in the Multifamily Working Group (MFWG) and implementation of Multifamily Common Area Measure (MF CAM) projects;
- Prioritization of 2020 first-time treatment customers and other hard-to-reach segments including multifamily;

[1] The ESA Program was formerly known as the Low-Income Energy Efficiency (LIEE) Program.
[2] Advice Letter 5256 approved May 18, 2018, Advice Letter 5311 approved July 18, 2018, Advice Letter 5325 approved December 19, 2018.

- Program adjustments through Clear Plan, Smart Thermostat, and Mid-Cycle Advice Letters;

- Participation in the Mid-Cycle Working Group (MCWG) and Cost Effectiveness Working Group (CEWG);

- Implementation of High Efficiency (HE) Forced Air Unit (FAU) furnace measure;

- Following statewide Request for Proposals (RFP) held in 2017, awarded contract for Toilet Tank Efficiency Kit to be provided, along with other give-away collateral, to income-qualified households as part of the In-Home Energy Education program component provided at the time of enrollment; and

- Implemented joint Investor Owned Utility (IOU) Multifamily Property Owner Authorization and Affidavit. The form was designed to meet several objectives; obtain owner authorization for in-unit measures, common area measures, owner certification of tenant eligibility, type of deed restricted building eligibility and the other types of energy efficiency programs the property may qualify for participation.

1.1 Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy

In D.07-12-051, the CPUC updated its policy objectives for the ESA

Program stating:

> "[T]he key policy objective for the LIEE Programs, like that of our non-LIEE Energy Efficiency Programs, is to provide cost-effective energy savings that serve as an energy resource and to promote environmental benefits. Concurrently we retain our commitment to ensuring the LIEE Programs add to the participant's quality of life, which implicates, equity, energy affordability, bill savings and safety and comfort for those customers who participate in LIEE Programs."[3]

To achieve these objectives, the CPUC adopted a programmatic ESA Program initiative

"to provide all eligible LIEE customers the opportunity to participate in LIEE Programs

[3] D.07-12-051 at p. 25.

Footnote continued on next page

and to offer those who wish to participate all cost-effective energy efficiency measures in their residences by 2020."[4]

The California Long-Term Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA Program, and 2) The ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

Please identify the IOU strategies employed in meeting Goal 1: Improve Customer Outreach

Implementation Plan and Timeline		
Strategies	**Long Term 2017 - 2020[5]**	**IOU strategy employed this program year**
1.1: Strengthen program outreach using segmentation analysis and social marketing tools.	Continue to access and evaluate customer-behavior and energy savings; improve upon outreach to eligible communities.	• In PY2018, SoCalGas continued to utilize the process of subdividing low-income customers into identifiable segments. This allowed SoCalGas to design a marketing mix that was tailored to targeted customers based on socioeconomic demographics and psychographics that tracked customer behaviors and aligned with the customer's expectations. Five segments were created from this process and the analysis revealed that segment five is where most of the ESA Program and CARE customers were clustered. Segment five identified high indices of low-income, high credit and collections, low usage,

[4] *Id.*
[5] California Energy Efficiency Strategic Plan, January 2011 Update. Section 2 – Page 25 and Section 2 – Page 27.

		and branch office payment methods. • In PY2018, SoCalGas used updated customer data and its customer segmentation process to test different marketing and outreach approaches in a pilot program with the City of Paramount. • In PY2018, SoCalGas' ESA Program continued to leverage the CARE Program by utilizing its source codes to identify and track newly enrolled CARE customer lists and CARE rate transfer customer lists to deploy monthly email and direct mail campaigns. Customers on these two lists have a higher probability of being eligible for the ESA Program. • In PY2018, SoCalGas launched an eight-week pilot Bilingual Out-of-Home community media campaign which culminated in mid-January 2019. The objective of the campaign was to target customers at a community level to drive awareness that would lead to enrollment into the ESA Program. Two pilot cities chosen for this campaign, Paramount and South Gate, were targeted due to their high percentage of customers likely to be eligible for the ESA Program.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	• Evaluate progress/refine strategy	During PY2018, the following strategies have resulted in successful progress in developing and perpetuating a recognizable and trustworthy brand for Customer Assistance Programs:

		• All ESA Program marketing and advertising campaigns (e.g., collateral, giveaways, direct mail, email, and social media) continue to display the ESA Program logo brand. SoCalGas continued to make polo shirts, t-shirts, and vehicle magnets with the ESA Program brand insignia available to the ESA Program contractors for use in their outreach efforts. • The Bilingual Out-of-Home community media campaign, stated above, focused on highlighting the contractor and customer interaction experience. The image and message aimed to build program awareness and strengthen customer trust of program representatives and contractors. The campaign targeted customers in Paramount and South Gate which have low program penetration and a likelihood of higher customer eligibility. It ran for eight weeks from end of November through January 2019 to align with the beginning of the winter heating season. The campaign planned to include program messaging in 94 total venues. Final results were reported in January 2019. • SoCalGas has continued to engage in co-branding efforts with Southern California Edison Company (SCE) on joint IOU printed materials.

1.3: Improve program delivery.	• Ongoing: Use information from segmentation analysis to achieve efficiencies in program delivery. • Ongoing: Leverage with local, state, and federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment.	• SoCalGas continued to work with their External Affairs department to secure and/or update information on city and county websites and to display materials in local government offices to promote the ESA Program. Additionally, SoCalGas' External Affairs department proactively provides marketing messaging to their regional areas in local broadcasts and through the use of social media (Twitter/Facebook) to promote SoCalGas' Customer Assistance Programs to their local government contacts. • SoCalGas has continued to work with Local Government Partnerships, including Council of Governments to disseminate information to its membership base and to present SoCalGas' Customer Assistance Program information at their meetings. • Community Based Organizations (CBOs) working with SoCalGas continued to utilize their intake processes to promote the ESA Program and CARE along with the other community services they provide. In PY2018, SoCalGas continued working with Mixteco Indigena Community Organizing Project (MICOP). This CBO serves Ventura County which has approximately 20,000 indigenous speakers (residents who speak neither English nor Spanish, but who speak various indigenous languages, such as Zapoteco or Mixteco). In order to provide outreach to these residents and

		customers - primarily farmworkers and persons with limited English proficiency (LEP) - SoCalGas has collaborated with MICOP to extend awareness of the CARE Program through each intake and event to highlight SoCalGas' Customer Assistance Programs. In PY2018, SoCalGas began developing relationships in the tribal community. SoCalGas had a presence at 14 tribal events throughout the service territory including attending the American Indian Chamber Expo and became an active member of the Inter-Tribal Educational Collaborative (ITEC).
1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.	• Implement ESA Program workforce education and training • Coordinate ESA Program workforce and service providers with broader market	• SoCalGas continued to provide ESA Program workforce education and training to its contractor network by offering trainings and refreshers both in a formal classroom setting at SoCalGas' Energy Resource Center (ERC) and at contractors' offices. Monthly classes were held for new program representatives, quarterly trainings for contractor back office personnel, and larger scale trainings were also provided to support new elements being implemented into the program that cover policies, processes, measures and program tools such the Home Energy Assistance Tracking (HEAT) System and the ESA Program Mobile site used for enrolling customers electronically into the program. • In-Home Energy Education enhancements included issuing a joint IOU RFP for the Toilet

		Tank Efficiency Kit. The kits are expected to be available by the end of Q1 2019. The kit will include an insert with cold water conservation tips to continue promoting water conservation throughout the state. • SoCalGas continued to partner with SCE to provide contractor personnel with access to an online computer-based training tool to support their development of software skills applicable to the workforce. Courses offered included Microsoft programs such as Word, Excel, Power Point, Access and other advanced programs such as Microsoft Project and SQL. These course offerings support the growth and development of contractor personnel by equipping them with the skills to manage and administrate the ESA Program successfully.

Please identify the IOU strategies employed in meeting <u>Goal 2</u>:
Energy Savings Assistance Program as an Energy Resource

Implementation Plan and Timeline		
Strategies	**Long Term 2017 - 2020**	**IOU strategy employed this program year**
2.1: Increase collaboration and leveraging of other low-income programs and services.	• Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.	• In PY2018, SoCalGas has continued to employ a reciprocal promotional methodology between the ESA Program and CARE. Data is shared across programs to identify opportunities for enrollments (i.e., CARE participants not participating in the ESA Program and ESA Program participants not participating in the CARE

		Program). This successful approach is anticipated to continue to be used in the future for SoCalGas. • In PY2018, SoCalGas continued their working relationship with the Catholic Charities of Orange County (CCOC) that helps eligible clients apply for CalFresh/Food stamp benefits through application assistance workshops offered monthly in Santa Ana, Orange, and San Juan Capistrano. The workshop educates attendees on the CalFresh application process as well as the ESA Program and CARE; the majority of attendees at the workshops are women. Both the ESA Program brochures and CARE applications are distributed regularly. • SoCalGas also continued its relationship with Los Angeles County Department of Public Social Services (DPSS) CalFresh Team. A training was hosted at SoCalGas' ERC in Downey for CalFresh eligibility case workers to kick off CalFresh month and to provide information on SoCalGas' Customer Assistance Programs. This partnership has led to a relationship with the County, with the outreach team manager included as an active member of the partner team for CalFresh events. • In an effort to promote the ESA Program and support its contractors, SoCalGas launched the Bilingual Out-of-Home

		community campaign. The campaign objective was to build program awareness and customer trust of contractors. Strengthening trust in program contractors will improve their success with enrollments.
2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.	• Continually reevaluate and update programs to take advantage of new technologies.	• SoCalGas has leveraged sponsorships of community events between the Customer Assistance Programs and other departments by taking the opportunity to present the ESA Program and CARE information at community outreach events, and by streamlining internal processes and leveraging new and innovative resources with regards to research and data that include metrics and marketing. Examples of these efforts include partnerships with Energy Efficiency (EE) Program's Integrated Demand Side Management (IDSM) for data and the Single Point of Contact (SPOC) model to reach and educate large housing portfolio owners and managers of low-income and general EE Programs. By leveraging its successful SPOC model, SoCalGas has helped deliver large-volume ESA Program enrollments which have helped affordable portfolio owners throughout our assigned service territory reduce energy and water usage which can lower owner/tenant operating costs and improve resident satisfaction. With its SPOC initiative, SoCalGas has consistently delivered fully integrated multi-program solutions in a simplified manner tailored to the unique

		needs of customer/property site. Portfolio owner feedback indicates SPOC has removed program silo barriers, improved operating efficiencies and streamlined the often cumbersome customer enrollment process. • SoCalGas continued to participate in community forums with other utilities, water agencies, local municipalities and ESA contractors to maximize on-site education, and opportunities on comprehensive energy and water savings. • In PY2018, SoCalGas leveraged Home Energy Reports (HERs) to reach 156,000 low-income customers to: 1) educate them on their gas usage; 2) inform them of energy saving tips; and 3) when applicable, encourage enrollment in the ESA Program. This effort resulted in 4,691 ESA enrollments and 4,586 CARE enrollments.
2.3: Provide low-income customers with measures that result in the most savings in the Energy Savings Assistance Program.	• Continue to evaluate opportunities to incorporate new energy efficiency measures into the ESA Program, e.g., plug-load reduction, new Heating, Ventilation and Air Conditioning (HVAC) technology.	• In PY2018, SoCalGas continued to provide all feasible measures to qualifying customers' homes. These measures incude HE clothes washers, Standing Pilot Retrofit Kits, attic insulation, furnace clean and tune, and thermostatic tub spouts. In addition, SoCalGas introduced the HE FAU furnace as a new measure. As required in D.16-11-022, in 2018, SoCalGas developed and began implementing the new "prescriptive duct sealing" measure as an alternative to

		"duct test and seal" in cases where the test was not required by code. The new measure is intended to yield energy savings through duct sealing while saving the time and expense associated with testing. SoCalGas also received approval to begin installing smart thermostats, and began making preparations to deliver that measure.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	• Continue to evaluate approach to determine whether additional segments are needed.	• See Section 1.1: Alignment of ESA Program with Strategic Plan Goals and Strategy, regarding continuing the process of subdividing low-income customers into identifiable segments based on socioeconomic demographics that track customer behaviors and align with customers' expectations. This process identified customers likely to be eligible for the program.

1.2 Energy Assistance Savings Program Overview

SoCalGas' ESA Program serves all eligible low-income customers willing to participate in the program by providing all feasible ESA Program measures[6] as determined through the outreach and assessment and installation processes. In PY2018, the ESA Program treated a total of 99,457 homes,[7] including 40,998 served for the first time since 2002 as SoCalGas continued to make progress

[6] *See* D.08-11-031, at Ordering Paragraph (OP) 15.
[7] Per D.02-12-019, the CPUC defines a "treated" home as an income-qualified home that has received any measure or service under the ESA Program, including energy education, compact fluorescent lamps, weatherization and appliances. Under the ESA Program, a treated home must receive all feasible measures for which it qualifies.

toward achieving the goal of providing services to every willing and eligible customer by 2020. In PY2018, the treated total was 59% of the annual homes treated goal of 169,910 as adopted in the disposition letter approving AL 5325, issued on December 19, 2018. Also, in PY2018, a total of 99,242 homes were weatherized.[8]

As part of its comprehensive services to eligible ESA Program participants, SoCalGas provided In-Home energy education to 78,888 customers; envelope and air sealing measure to 78,657 homes; attic insulation improvements to 5,657 homes; 93,862 homes received Domestic Hot Water measures; 31,740 furnace clean and tune measures; 2 FAU standing pilot change outs, and duct sealing weatherization measures to 7,343 homes. In addition, SoCalGas provided and/or serviced 15,735 appliances including 1,985 water heaters, 8,674 furnaces and 5,076 HE clothes washers. A total of 14,860 customers were classified as "ineligible" or "unwilling"[9] to participate in PY2018 which represents approximately 15% of the number of homes treated in PY2018. The average per home lifecycle bill savings for the PY2018 ESA Program was $106.18.

---

[8] Per D.02-12-019, the CPUC defines a "weatherized" home as a subset of treated homes, and are defined as income-qualified homes that have received any weatherized measures (e.g., weather-striping and caulking) under the ESA Program.

[9] Ineligible & Unwilling is defined as leads that do not result in a customer enrollment based on one of the following reasons: customer refused; home does not meet minimum measure requirement; customer is moving; over income; owner refused for renter occupied single family; unable to provide homeownership documentation; or home weatherized under another program.

ESA Program expenditures and therm savings for PY2018 are reflected in the following summary table.

Provide a summary of the Energy Savings Assistance Program elements as approved in D.14-08-030, D.16-11-022 and D.17-12-009:

Program Summary			
	Authorized Budget/ Planning Assumptions*	**Actual**	**%**
Budget**	$198,805,588	$94,492,552	48%
Homes Treated	169,910	99,457	59%
Therms Saved	6,210,000	1,575,510	25%

* Annual budget, homes treated goals and therms saved targets approved in Disposition of Advice Letter 5325
** Reflects authorized levels; does not reflect fund shift transactions.

SoCalGas continued to prioritize providing a positive customer experience as a core objective for the ESA Program in PY2018. To help evaluate and manage customer satisfaction and program delivery, SoCalGas surveys customers quarterly so as to understand customer satisfaction with the ESA Program as a whole as well as to specific programs including enrollment, installation, and inspection visits. Customized evaluations are used to help ESA Program contractors understand customer viewpoints and to develop insight on ways to enhance and improve service delivery.

In PY2018, 48% of customers rated their overall quality of service as "excellent." In addition, 56% rated their sign-up experience as "excellent," 54% rated their quality of installation experience as "excellent," and 60% rated their quality of inspection as "excellent." SoCalGas maintains its commitment to work closely

with its contractor network to drive program improvement and to pursue improvements to these customer service results.

1.3 Marketing, Education and Outreach

1.3.1 Provide a summary of the geographic segmentation strategy employed, (i.e. tools and analysis used to segment "neighborhoods," how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

SoCalGas utilized its 2017 Customer Segmentation Study and newly available customer data from a leading consumer data company to identify cities with eligible ESA Program customers. The City of Paramount was identified as a city with a high percentage of eligible customers and was selected for a pilot in which letters and emails using different messaging, images and calls to action were tested for effectiveness. The results of the testing intended to inform the optimal messaging for letters and emails in future targeted neighborhood campaigns. The most successful email featured an image of a contractor installing a showerhead and directed customers to "apply today." The specified and targeted subject line "A Special Message for Paramount Residents" generated the highest open rate. SoCalGas will incorporate these best practices in future campaign messaging.

1.3.2 Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, energy burden and energy insecurity) and how these customer segments are targeted in the Whole Neighborhood Approach to program outreach.

Focusing on the 2020 customer goal and Clear Plan, the Whole Neighborhood Approach (WNA) was not implemented in PY2018.

SoCalGas used updated customer data and its existing customer segmentation process to test different messaging and communications to reach eligible 2020 customers. Although the WNA was not implemented in PY2018, a pilot in the City of Paramount was conducted which revealed effective email content, direct mail messaging and outreach tactics that will be implemented as part of the 2020 Clear Plan.

1.3.3 Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and inspections.

The overall SoCalGas program delivery strategies employed in PY2018 remained consistent with previous years. In PY2018, focus was on the hard-to-reach low-income communities. SoCalGas continued to leverage and share best practice approaches from partners, internal programs, other utilities, state agencies, and CBOs. As described above, SoCalGas targets ESA Program customers using newly available customer data, recently enrolled CARE contacts and customers participating in other low-income resource programs such as Medical Baseline (MBL), Gas Assistance Fund (GAF), and Low Income Home Energy Assistance (LIHEAP). SoCalGas also uses demographics and segmentation to identify ESA Program customers to provide in-language and in-culture marketing and outreach.

In PY2018, SoCalGas purchased out-of-home community media advertising to reach ethnic communities and utilized ethnic-owned media as a means to effectively reach those customers, spending over $38,000 on

ethnic media. The messaging in the out-of-home campaign focused on providing program information in both English and Spanish to reach non-English language customers. Along with the out-of-home and ethnic media advertising, SoCalGas participated in community events that attracted the attendance of low-income customers and also celebrated diversity in the community. In PY2018, SoCalGas participated in over 330 community events, with some at no-cost, that provided program awareness for the ESA and CARE Programs. Because of the continued relationships that SoCalGas has established with organizations that helped serve low-income customers in ethnically and socially diverse communities, event outreach efforts increased in 2018. Such partnerships included Catholic Charities of Orange County, LA County Department of Public Social Services (DPSS) CalFresh, 211 LA, Fiesta Educativa, Southern California Resource Center (SCRS), Radio Campesina, the Cesar Chavez Foundation, MICOP, Unity Shoppe, Foodbank of Santa Barbara and the Inter-Tribal Educational Collaborative (ITEC), as well as other non-profit organizations that understand locally diverse communities. By utilizing their connections and expertise in understanding their local ethnic communities, these partnerships assisted SoCalGas in promoting the ESA Program and CARE as well as MBL and other SoCalGas Customer Assistance Programs. Connections and partnerships with CBOs are crucially important not only to increase overall program awareness and enrollment, but also to assist when communicating with customers

impacted by natural disasters such as the Canyon Fire in Orange County and the Thomas Fire and mudslides near Santa Barbara to provide information about available assistance programs from SoCalGas.

1.3.4 Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making), including costs for Energy Education.

On December 19, 2018, the CPUC approved the implementation of the smart thermostat as a standard measure of the ESA Program for SoCalGas through the end of 2020. A pilot is scheduled for 2019 to measure the appeal of the smart thermostat as the lead feature of marketing material to result in incremental enrollments in the ESA Program.

1.4 Energy Savings Assistance Program Customer Enrollment Evaluation

1.4.1 Distinguish between customers treated as "retreated or go-backs" and "first touch" customers so that the CPUC has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

D.16-11-022 permanently eliminated the Go-Back Rule throughout SoCalGas' service territory. Previously, homes already treated once since 2001 could not be treated a second time. In PY2018, SoCalGas treated 40,998 customers for the first time since 2001, thus increasing SoCalGas' progress toward the 2020 goal to 1,211,997 since 2001. In addition, SoCalGas treated 58,459 homes previously treated, bringing total 2018 treatments to 99,457.

1.4.2 Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

In PY2018, SoCalGas continued to use Categorical Eligibility (CE)[10] and self-certification[11] as tools to streamline customer enrollments to the ESA Program. Both of these categories of eligibility decrease the required income documentation. With CE, customers who can provide documents validating participation in one of the designated state or federal assistance programs do not need to provide additional income documentation in order to enroll in the ESA Program and/or CARE.

Categorical Eligibility: SoCalGas' Regional Public Affairs and Media Relations departments continued to inform the public of the ESA Program, its enrollment process, and requirements. The Media Relations department issues an annual press release on the updated income guidelines and accepted CE programs. SoCalGas continues to provide the list of CE programs on its company website (www.socalgas.com/assistance) and in its ESA Program brochures which are printed in multiple languages (English, Spanish, Chinese, Korean, and

[10] Categorical programs include: Medicaid/Medi-Cal, Women, Infants, and Children Program (WIC), and the Low-Income Home Energy Assistance Program (LIHEAP), Supplemental Nutrition Assistance Program, Tribal Temporary Assistance to Needy Families (TANF), Bureau of Indian Affairs General Assistance (BIA GA), National School Lunch.

[11] In D.05-10-044, the CPUC allowed SDG&E and SoCalGas to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements enroll customers in the Energy Savings Assistance Program through self-certification, if those customers lived in areas where 80% of the households were at or below 200% of the FPL. In D.06-08-025, D.06-12-038, and D. 08-11-031, the CPUC allowed continuation of the self-certification process described above.

Vietnamese). In PY2018, SoCalGas continued its partnership with the Los Angeles County DPSS to host a training for over 150 CalFresh Eligibility Supervisors and provided them with information on the CARE Program. As the DPSS case managers work with their clients to apply for CalFresh, they are providing them with additional savings opportunities by sharing information on SoCalGas' Customer Assistance Programs. LA County DPSS CalFresh department also hosts and participates in events throughout LA County where they continue to promote SoCalGas' Customer Assistance Programs.

Self-certification: In PY2018, SoCalGas conducted outreach and assessment refresher classes to its ESA Program contractors to help increase awareness of all customer and home eligibility requirements for the ESA Program. These courses addressed topics related to the various methods to income qualify households such as self-certification, CE, CARE Post Enrollment Verification (PEV), and leveraging other IOUs for enrollment or full documentation.

1.4.3 If the IOU has failed to meet its annual goal of number of households served, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual goals of number of households served.

SoCalGas' treated total of 99,457 in PY2018 was the highest yearly total since 2013. Nevertheless, it was short of the goal of 115,500 established in D.16-11-022, and further short of the adjusted goal of 169,910 adopted in the Non-Standard Disposition of AL 5325 issued December 19, 2018.

Furthermore, SoCalGas treated 40,998 “first-time” homes in PY2018. This was an increase from the 2017 level of 35,366, but short of the target for first-time treatments set initially at 115,491 in Resolution G-3532 issued December 14, 2017 and ultimately set to 116,592 in the Disposition of AL 5325. However, SoCalGas exceeded its “go-back” unit target, delivering 58,459 go-backs compared with a target of 53,318.

As SoCalGas has noted in the past reports, the pool of willing first-time treatment homes continues to become more scarce as the the ESA program matures. The identification and enrollment of willing first-time homes are more costly and time-consuming than go-back/retreatment homes. The modest increase in first-time treatments that SoCalGas delivered in 2018 followed several years of declines as this target population continued to shrink, and was the result of SoCalGas’ and contractors’ heightened focus on this segment.

In focusing on its 2020 goal and first-time households, SoCalGas did not consider it prudent to make adjustments that would result in an increase to go-back treatments. The total allocated budget for the cycle is primarily in place for the purpose of funding first-time treatment homes; therefore, there is a limit to the funds that can be expended to treat go-backs. As SoCalGas noted in AL 5256-A, “go-back customers interested in the program must continue to be served, whether they express interest by

calling SoCalGas, visiting the web site, are encountered in the process of contractor canvassing efforts, are provided to SoCalGas as leads through coordinated enrollment with SCE, or reside within a multifamily building being treated as a whole that includes both first-time and 'go-back' tenants."[12] Because it would be detrimental to the program to reach a point where such customers would have to be turned away, it is important that SoCalGas not prematurely run out of funds available for go-backs within the program cycle.

Thus, meeting the goal cannot be approached through go-backs, and must come from further penetration to first-time treatments. SoCalGas intends to continue to develop the "Clear Plan" effort in terms of using its data and market research to identify likely eligible customers, and using a variety of marketing and outreach tactics on a community-by-community basis to establish contact with these customers and enroll them, and document refusals when they arise.

In addition, SoCalGas will continue to develop program enhancements including more effective focus on multifamily buildings, using common area measures as a selling point for building owners, and delivering "simple" measures at the time of enrollment in cases where that is

[12] Advice Letter 5256-A approved 5/18/2018 at pg 8.

feasible. The introduction of smart thermostats to the program is also intended to enhance program appeal to customers.

1.5 Disability Enrollment Efforts

1.5.1 Provide a summary of efforts to which the IOU is meeting the 15% penetration goal.

The penetration rate for disability enrollment efforts in PY2018 dropped to 12.51% from 12.55% in PY2017. As in previous years, SoCalGas continued its focus toward targeting increased enrollments within other underserved areas such as the Inland Empire and coastal communities in PY2018. In addition, SoCalGas employed a liaison assigned to work with and expand SoCalGas' reach within the disabled community, leveraged existing relationships to expand organizations in which to target, worked with organizations serving the disabled community, provided educational materials, and facilitated information sessions and trainings for case workers and staff of organizations working with the disabled communities. Some of SoCalGas' highlights for disability outreach in PY2018 included working with key organizations and sponsoring key events listed below:

- Organizations that SoCalGas collaborated with to promote Customer Assistance Programs and push enrollments as local, trusted resources for the disabled community:
    - Fiesta Educativa
    - South California Resource Services for Independent Living (SCRS-IL)
    - Blindness Support Services

- SoCalGas hosted a resource table with Customer Assistance Program collateral and promotional giveaways tailored to the disability community at the following events:
    - Third annual Disability Pride Parade (East Los Angeles)
    - Abilities Expo (Los Angeles)
    - Rancho Los Amigos Rehab Hospital Roll Around the Rancho Health and Fitness event (Downey)
    - Triumph Foundation's Wheelchair Sports Festival (Santa Clarita)
    - Long Beach Veterans Affairs Health Fair (Long Beach)[13]
    - Alma Families Wellness Fair (East Los Angeles)
    - Chinese Parents Association of the Disabled (CPAD) events (San Gabriel)
    - Asian and Pacific Islanders with Disabilities of California (APIDC) Statewide Conference (Anaheim)
    - EventsWay Finding Family Services Accessibility Resources (Culver City)
    - Vietnamese Disabled Families Event (Garden Grove)
    - Braille Institute Low Vision Resource Fair (Los Angeles/Hollywood)
    - Inland Empire Health Plan (IEHP) Disabilities Expo (San Bernardino)
    - Latinx Deaf Symposium – First Annual Deaf Conference for Latino and Spanish Speaking Families (Los Angeles)
    - DEAFestival Los Angeles (East Los Angeles)
    - Hawthorne's 19th Annual VIP Handicap Soccer Friendship Festival (Hawthorne)

[13] Although Long Beach is not part of SoCalGas' territory, participation in this event is important as it attracts veterans from the San Gabriel Valley and other nearby SoCalGas communities.

In PY2019, SoCalGas will continue to enhance its reach by employing various practices and approaches to be in touch with the disabled community.

1.5.2 Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

Braille booklets and large print brochures with ESA Program information were produced and provided to vision-impaired customers during community outreach events throughout the year. Vision-impaired customers that did not read braille but had other means of reading electronic information were given a USB thumb drive with Customer Assistance Program information in electronic text that was accessible with assistive reading devices. SoCalGas continues to improve its website to increase accessibility and the online experience to allow vision-impaired customers who use screen readers and similar assistive technologies to navigate and read its content. SoCalGas' My Account online bill pay system received the AA Seal of Approval from the Center for Accessible Technology for achieving AA accessibility standards in the "Account" section of the website in 2018.

1.5.3 Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result

Disability Enrollments			
Source	**Total Enrollment**	**Disability Enrollment**	**% of Disability Enrollment**
Campaign	1,580	163	10.32%
Capitation	104	7	6.73%
CARE Referral	2,967	97	3.27%
Customer Assistance Representatives Referral	199	17	8.54%
CPUC 2020 Clear Plan	97	13	13.40%
Direct Mail	677	73	10.78%
Energy Efficiency Referral	1,016	199	19.59%
ESA Mobile	799	157	19.65%
Gas Bill Insert	341	67	19.65%
HEAT Canvassing List	3,599	272	7.56%
InfoLine 211	121	8	6.61%
Joint Utility Data Sharing	806	151	18.73%
Joint Utility ESA Program, SCE	231	40	17.32%
LIHEAP	108	27	25.00%
Media/Leveraging Dept./Event	57	9	15.79%
Muni	11	0	0.00%
Neighbor/Friend/Relative Referral	2,286	437	19.12%
Newspaper/Radio/Television	53	10	18.87%
Other Utility or Municipality Referral	2,720	488	17.94%
Outreacher - Canvassing	72.022	8,172	11.35%
Received Services at Another Location	92	7	7.61%
REN Referral	44	2	4.55%
SoCalGas – Gas Assistance Fund/Medical Baseline	27	1	3.70%
SoCalGas - Internet	574	108	18.82%
SoCalGas Referral	2,353	601	25.54%
SoCalGas Email	168	33	19.64%
Telemarketing - Telephone	3,768	768	20.38%
Univision - Telethon	9	1	11.11%
WNA Approach	2,617	514	19.64%
WNA Census Self Certification	11	4	36.36%
Total	**99,457**	**12,446**	**12.51%**
Target Enrollment			**15.00%**

1.5.4 If participation from the disabled community is below the 15% goal, provide an explanation why:

Although the penetration rate for disabled enrollments fell below the 15% goal in PY2018, many efforts were pursued to enhance and expand outreach to the disability community. For example, SoCalGas continued to partner with several key organizations such as Fiesta Educativa, Disability Community Resource Center West LA (DCRC - formerly Westside Center for Independent Living), Long Beach Veteran's Administration Blind Veterans Association,[14] Rancho Los Amigos, MEND San Fernando, Triumph Foundation Santa Clarita, Pushrim Downey Spinal Cord Network, TASK Orange County, and Southern California Rehabilitation Services - all trusted sources that provide special resources for these communities. SoCalGas' partnership included sponsoring key events, presenting at workshops, training organization staff and case workers and distributing program materials at local offices as well as providing materials during one-on-one visits with community members and at local community events.

Additionally, disability enrollments are tracked by contractors who may not be aware of a customer's disability at the time of enrollment, particularly if the customer does not self-disclose their disability during the enrollment process. However, in PY2018 SoCalGas continued to

[14] Although Long Beach is not part of SoCalGas' territory, partnership with this organization is important as it services a large portion of the San Gabriel Valley and other nearby SoCalGas communities.

increase collaborative partnerships that worked towards enrolling individuals with disabilities that may qualify for the ESA Program, CARE, or MBL. As in previous years, SoCalGas has continued to focus its efforts on organizations and events that are in areas that are underpenetrated in the programs in order to reach special needs customers. Going forward, contractors will continue to be engaged at more disability outreach events to generate and track related ESA Program leads from events serving customers with disabilities.

1.6 Leveraging Success Including LIHEAP

D.08-11-031 defined leveraging as "an IOU's effort to coordinate its ESA Program with programs outside the IOU serving low-income customers. These include programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low-income households." In PY2018, SoCalGas continued to leverage resources to support low-income customers. Success is measured by tracking the following criteria:

- **Dollars saved**: Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU. Shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, replacement and repair of measures, among others are just some examples of cost savings to the IOU.

- **Energy savings/benefits**: Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.

- **Enrollment increases**: Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

- **ESA Table 14 – Leveraging & Integration**: Please refer to ESA Table 14 for additional details.

1.6.1 Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low income programs offered outside the IOU that serve low income customers.

For SoCalGas' ESA Program dollar savings, energy savings/benefits, and enrollment tracking and reporting associated with leveraging efforts, refer to ESA Table 14 – Leveraging & Integration.

The participating agencies that provided SoCalGas' ESA Program dollar savings, energy savings/benefits, and measure leveraging agreements that included co-funding of HE clothes washers in PY2018 are:

- Eastern Municipal Water District[15]
- Fontana Water Company[16]
- Liberty Utilities, formerly Park Water Company[17]
- Metropolitan Water District[18]
- San Gabriel Valley Water Company[19]

---

[15] Cities in the Eastern Municipal Water District service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula.
[16] Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.
[17] Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.
[18] Metropolitan Water District is a regional wholesaler that delivers water to 26 member public agencies: 14 cities, 11 municipal water districts, one county water authority – which in turn provides water to more than 19 million people in Los Angeles, Orange, Riverside, San Bernardino, and San Diego and Ventura counties.
[19] San Gabriel Valley Water Company serves the communities of: Arcadia, Baldwin Park, El Monte, Industry, Irwindale, La Puente, Montebello, Monterey Park, Pico Rivera, Rosemead, San Gabriel, Santa Fe Springs, South El Monte, West Covina, Whittier and unincorporated portions of Los Angeles County, in the communities of Bassett, Hacienda Heights, Los Nietos and South San Gabriel.

As a result, co-funding from all water agencies totaled $344,031 in PY2018.

In addition to water leveraging opportunities, SoCalGas worked with municipal electric providers through the ESA Program. SoCalGas administers programs for the following municipal electric providers:

- Anaheim Public Utilities
- Colton Electric Utilities
- Los Angeles Department of Water & Power
- Pasadena Water and Power
- Riverside Public Utilities

Municipal Utility	Number of Units Served
Anaheim Public Utilities	1,052
Colton Electric Utilities	258
Pasadena Water & Power	137
Riverside Public Utilities	106
Los Angeles Department of Water & Power	6,253
Total	7,806

Some of the electric measures installed via the collaborative effort included LED bulbs, Smart Power Strips, LED Torchiere Lamps, A/C Tune-ups, Refrigerator Assessments, Duct Testing & Sealing, and Room A/C Replacement. Qualifying measures varied per electric provider and availability of funding.

1.6.2 In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

For SoCalGas' ESA Program dollar savings, energy savings/benefits, and enrollment tracking and reporting associated with leveraging efforts, refer to ESA Table 14 – Leveraging & Integration.

In PY2018, SoCalGas' collaborative efforts with Anaheim Pubic Utilities, Colton Electric Utilities, Los Angeles Department of Water & Power (LADWP), Pasadena Water & Power and Riverside Public Utilities created leveraging opportunities that provided comprehensive energy savings to the joint customers of the respective municipal electric provider. The added benefits of working together included the addition of water saving devices, leveraging combined marketing materials and focused efforts on high potential customers including those in disadvantaged communities. The acceptance of customers to participate in programs that provide water, electric and natural gas measures contribute to higher participation rates and greater customer satisfaction. The joint efforts reduce the touch points per customer which traditionally cause disruption for customers, and the combined efforts minimize administrative burden and cost inefficiencies.

Additionally, leveraging with water utilities and districts provides up to 8,000 gallons per washer per year savings. HE clothes washer costs may

otherwise limit low-income customers from realizing the water and energy savings, and the leveraging of the ESA Program with other water utilities that do not have direct install programs for HE clothes washers provides an opportunity to reach low-income customers that would otherwise not be able to fund the difference between the appliance cost and available water utility rebate offers. This demonstrates SoCalGas' support for statewide conservation efforts.

1.6.3 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

Pacific Gas and Electric Company (PG&E), SCE, San Diego Gas & Electric Company (SDG&E) and SoCalGas met with Department of Community Services and Development (CSD) staff throughout PY2018 to discuss data sharing, CSD's Low Income Weatherization Program for multifamily properties (MF LIWP) leveraging, and other opportunities, in compliance with D.16-11-022 directives. In the fourth quarter of 2017, the IOUs and CSD began working to implement D.16-11-022 leveraging requirements to share IOU data usage information for CSD clients, and to fund ESA Program measures currently offered by the ESA Program for multifamily customer households participating in CSD's MF LIWP Program.

CSD Data Sharing: Per D.17-12-009, Attachment 1, OP 183, SoCalGas and CSD entered into a non-disclosure agreement (NDA) for data sharing purposes. This fully-executed NDA allowed for data sharing to begin as

required in D.17-12-009. CSD confirmed that their first data share request met all terms within the agreed upon NDA. SoCalGas fulfilled two CSD data requests in PY2018, the first in February 2018 and the second in December 2018. Each request provided customer names, service addresses, bill account IDs, and monthly usage and billing data for several thousand customers. SoCalGas, CSD, and the other IOUs are continuing discussion to determine frequency of future data sharing efforts, along with other possible technological mechanisms to make this data sharing as seamless as possible.

CSD MF LIWP Leveraging: D.16-11-022 required SoCalGas to fund ESA Program measures currently offered by the ESA Program for multifamily customer households participating in CSD's MF LIWP Program. SoCalGas worked with CSD to project installation rates for these measures, including SoCalGas costs for both labor and the measures. The funding level was projected for this effort, with the goal of funding the CSD's MF LIWP efforts for those in-unit measures provided by the ESA Program, thereby preserving the remaining CSD's funding for use to install central systems and common area measures not provided by the ESA Program. SoCalGas' budget for this effort was included in its conforming Advice Letter submitted on March 30, 2017, and supplemented on April 4, 2017, and was authorized by Resolution G-3532 issued December 21, 2017. Since working with CSD to develop a budget

for LIWP leveraging efforts, SoCalGas ESA Program Management, Legal, and Supply Management have been actively working with CSD teams to complete contract/agreement terms necessary to begin leveraging funds. SoCalGas and CSD executed a cost reimbursement agreement on April 2, 2019.

1.6.4 Describe the coordination efforts with water agencies or companies (wholesalers or retailers).

SoCalGas leveraging opportunities maximize joint energy collaboration for comprehensive natural gas, electric and water savings. SoCalGas' ESA Program has administrated co-funding opportunities and program support with numerous water agencies. These efforts promote collaboration and allow for comprehensive savings to be captured and reported.

- Metropolitan Water District (MWD) signed a $1.5 million agreement with SoCalGas to co-fund HE clothes washers throughout their joint service territories.
- American Council for Energy-Efficient Economy (ACEEE) recognized SoCalGas' leveraging partnership with Irvine Ranch Water District (IRWD) as an exemplary program as described in the excerpt below:[20]

Irvine Ranch Water District, Southern California Edison, Southern California Gas Company, One-Stop Shop for Water and Energy Efficiency

[20] *See* https://aceee.org/sites/default/files/publications/researchreports/u1901.pdf pg. 115-116

PROGRAM AT A GLANCE

Implementation Organizations	Irvine Ranch Water District (IRWD), Southern California Edison (SCE), Southern California Gas Company (SoCalGas)
State where offered	California
Customer segment served	Residential
Program start date / year established	2016
Annual energy savings (gross MWh)	1,190
Peak demand (gross kW) savings	448
Other measures of program results	71% of participating homes received both water and energy-efficient measures, indicating strong support for the combined program.
Budget	$2.6 million
Funding sources	IRWD grant from Department of Water Resources Greenhouse Gas Reduction Fund, California utility customers under the auspices of California Public Utilities Commission
Website	http://rightscapenow.com/

IRWD collaborated with SoCalGas and Southern California Edison (SCE) to offer a water–energy nexus direct-install program to mutual residential customers in the IRWD service area. The program leveraged existing rebate incentives provided by each agency.

The direct-installation program was provided at no cost to participants. IRWD funded water efficiency devices while SCE funded energy efficiency devices. Qualified customers were eligible to receive high-efficiency energy and indoor water efficiency devices during the same visit, by the same contractor, making this program a true one-stop shop. Eligible energy- and water-efficient devices offered through the program included faucet aerators, showerheads, high-efficiency toilets, weather-based irrigation controllers (WBICs), pool pumps, power strips, HVAC tune-up, and lighting fixtures. The outdoor landscape contractor provided additional technical assistance to participants who received weather-based irrigation controllers to instruct them on proper programming and operation of the device.

A strategic marketing approach was employed to identify customers with the highest savings potential for all three utilities: water, natural gas and electricity. In addition to customers being screened for previous participation in water and energy efficiency programs, the age of the home also informed the potential water savings.

EXEMPLARY FEATURES AND ACCOMPLISHMENTS

Almost 2,000 homes participated. The majority (71%) received both water- and energy-efficient measures, indicating strong support for the combined program. The high levels of customer satisfaction led to a 41% participation rate from customers who learned about the program from friends and family. The program's marketing, outreach, and participation rates are well-documented and have been shared with agencies interested in replicating the program.

LESSONS LEARNED

Bundling the water and energy efficiency devices made customers more likely to participate and schedule time to have many devices installed as opposed to one.

The three utility agencies met biweekly for more than a year prior to launching the program to establish acceptable methods of agency cooperation and customer data sharing. The program is a result of reaching an agreement on program design and workflows, the water and energy measures offered, and the marketing materials that were developed to satisfy all agencies' legal counsel with regard to disclaimer language and use of logos.

1.7 Integration Success

1.7.1 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the CARE Program.

As in previous years, SoCalGas continued to employ data sharing, Integrated Voice Recognition (IVR), customer call center, emails, social media and others as noted below to connect the Low-Income Programs.

Data Sharing: The ESA Program shares data with the CARE Program. New ESA Program customers are automatically enrolled for the CARE discount and are exempted from PEV if their income eligibility has been verified by the ESA Program. Targeted marketing campaigns for the ESA Program also utilize lists of all eligible CARE customers who have not received ESA Program services. During PY2018, SoCalGas' ESA

Program marketing and outreach continued a direct mail campaign targeting all new customers who were automatically enrolled onto CARE. This campaign targeted the segment of low-income customers who recently moved into a new residence and may be eligible for ESA Program measures.

Integrated Voice Recognition (IVR): Multi-lingual messages regarding the ESA and CARE programs are made available on SoCalGas' main call center IVR system. When a customer calls SoCalGas for any reason, they will hear an automated message regarding Customer Assistance Programs including: CARE, the ESA Program, and MBL. This message is also reinforced by live customer service representatives when customers call to establish service or make bill payment arrangements. Customer Service Representatives (CSRs) initiate conversation about the CARE program and take applications over the phone during these specific calls. Additionally, a separate IVR phone number is printed on self-certification and recertification CARE applications. Through the IVR, customers can follow the prompts in either English or Spanish and respond verbally or through push-button on their phone, to enroll in CARE or recertify their eligibility.

Branch Payment Offices: ESA Program and CARE information is displayed and available at SoCalGas branch payment offices. When

income guidelines are updated each year, all branch offices receive new brochures, which are regularly replenished. Branch Payment Office clerks are trained to promote both the ESA Program and CARE.

Customer Contact Center (CCC): In February 2018**,** SoCalGas CSRs began offering CARE and enrolling customers during turn-on and payment extension calls. Information regarding other Customer Assistance Programs is provided to facilitate enrollment of eligible customers in ESA and MBL. When a customer expresses interest in the ESA Program, a direct 800 telephone number is provided. MBL applications are mailed upon request. In addition, SoCalGas offers information on integrated programs for residential customers by mailing a conservation package during customer contact center bill inquiries; the package includes information on the ESA Program, CARE, MBL, EE rebates, energy-saving tips to help customers manage their gas bills, and is paired with information regarding CSD Programs.

Email Campaigns: SoCalGas deployed email campaigns for both the ESA and CARE programs to new and existing SoCalGas customers. The ESA Program emails sent to new CARE customers with email addresses featured the program services, including the average value of services received, and encouraged online enrollment by driving customers directly to the online ESA Program request (lead) form. The CARE emails went

to new and existing customers with email addresses communicated the 20% monthly bill discount and encouraged customers to apply online for immediate processing of their applications. The focused message of applying online generated 2,298 internet-generated leades for the ESA program and contributed to the 19,913 online CARE enrollments. Since online applications do not contain source codes, exact online enrollments cannot be tracked.

Credit and Collections: A collections status on a customer's account usually indicates a customer who is struggling to pay their bills because of financial issues. Therefore, when SoCalGas field representatives deliver pending disconnection notices in person to senior citizens and disabled customers, they also provide Customer Assistance Program information and educate customers about the ESA Program and CARE.

Outreach by Field Employees: Field service employees distributed Customer Assistance Program brochures to customers during each service visit at the customer's home.

Outreach at High Volume SoCalGas Payment Locations in Key Underpenetrated Areas: A pilot outreach program was conducted at three SoCalGas payment locations – Huntington Park, Crenshaw District and Central Los Angeles – on high volume days in underpenetrated areas.

An ESA Program contractor joined SoCalGas outreach staff to provide program information and sign up customers for the program on the spot. The results of the pilot are as follows:

Date	Location	Results
July 2, 2018	Huntington Park	• 36 ESA Program leads • 2 on-the-spot appointments • 1 CARE applications
July 9, 2018	Crenshaw District	• 47 ESA Program leads • 10 CARE applications
July 16, 2018	Central Los Angeles	• 12 ESA Program leads • 10 on-the-spot appointments • 9 CARE applications

1.7.2 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

In PY2018, the Single-Point-of-Contact (SPOC) model continued to be a focal point for the participation of low-income customers and property owners. As noted in section 1.6.1, in 2018, the partnership with LADWP has allowed the SoCalGas SPOC team to enroll and serve 6,253 low-income MF units through SoCalGas' ESA Program, where these units received both SoCalGas- and LADWP-funded measures. Additionally, the SPOC team has continued in engaging cross-portfolio work with numerous affordable housing portfolios. The SPOC team continues to engaged in presenting cross-portfolio energy and water efficiency recommendations to housing portfolios, representing over 900 total properties with over 60,000 total affordable units.

In PY2018, the SoCalGas SPOC team assisted in delivering three ESA Common Area Measure (CAM) pilot enrollments. Site audits were

conducted at these sites and common area measures were identified (e.g., central water hot heater and central boilers). One of the three pilots was completed in the city of Santa Ana, whereby, six 100-gallon hot water heaters were replaced. This property serves 127 units and this project helped improve the health, safety and comfort of low-come tenants. Remaining projects involve boiler replacements; audits, engineering and RFPs were conducted and installation will be completed in early 2019.

SoCalGas continued to adhere to the following four best practices for collaborating with large multifamily customers in delivering deep, cross-portfolio energy/water savings: 1) aligning integrated project retrofits with facility management requirements to identify viable projects; 2) providing Residential Segment SPOC services to customers; 3) integrating utility programs by streamlining program application processes; and 4) developing a roadmap for attaining additional program enrollments and savings over time.

Viable projects: Target large complexes to maximize per-site savings and align opportunities with facility management schedules and institutional requirements.

SPOC for customer-centric service: Assign a knowledgeable residential segment SPOC to streamline communication with customers and connect customers to utility partners for deeper, faster retrofits.

Integration of two utilities: Jointly offer efficiency/conservation programs with other IOUs or municipal utilities to streamline processes and incorporate higher-priority dual-saving (energy and water) technologies.

Roadmap to efficiency: Build long-term relationships at ownership-level over time starting with free services that lead to integrated shared-cost efficiency projects. Drive efforts and resources towards a multi-program enrollment model.

The ESA Program strived to provide greater integration and coordination efforts with EE programs. SoCalGas has implemented distinct and well-established energy efficiency program offerings for many years, especially as it relates to MF programs. Thus, to appeal to MF building owners and streamline customer touchpoints, SoCalGas enhanced the use of the Residential Segment SPOC. The SPOC was able to optimize activities and develop thoughtful, cross-portfolio recommendations. As the ad-hoc coordinator, the SPOC delivers key projects, which allowed multiple resource programs to be combined.

The SPOC approach ushered in a holistic approach in delivering SoCalGas' ESA/EE Program and services, as well as connecting customers with the energy and water programs of its overlapping electric utility partners. The SoCalGas energy efficiency programs frequently marketed by the SPOC included: the ESA Program, the Middle Income Direct Install program, Multifamily Direct Therm Program, Energy Upgrade California for Multifamily Properties, On-Demand Efficiency, California Solar Initiative and other EE programs, as appropriate. Program referrals were made based on customer needs and qualifications. For example, the SoCalGas SPOC would enroll owners of low-income housing in the ESA Program, but at the same time looked for other energy efficiency programs that would provide additional services and incentives beyond the ESA Program for both inside the dwelling units and in the common areas.

The experience provided by the SPOC allowed building owners to engage and participate in programs that they might not have been aware of otherwise and each package of program services and offerings was tailored to meet the customer's unique needs. For example, larger MF properties were often provided with a commercial grade audit to identify the maximum potential upgrades and related energy savings/benefits.

Overall, during PY2018, SoCalGas continued to collaborate with customers, utility partners, and program implementers to identify comprehensive energy and water efficiency solutions that meet unique customer needs. These collaborative efforts provided a model for how utilities could work with various multifamily ownership structures to generate deep and sustainable energy and water savings. A joint-utility effort between SoCalGas and LADWP helped streamline program participation to offer customers with combined gas, electric, and water efficiency incentives and services. The SoCalGas Residential Segment SPOC served as an important linkage in the process by ensuring that customers receive all available services and financial assistance the customers can qualify for, and that the customers receive these services and offerings in a seamless fashion.

1.7.3 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

SoCalGas has continued to work with local government partnerships, including the Council of Governments to disseminate information to its membership base and to present SoCalGas' Customer Assistance Program information at their meetings and partner at joint events.

1.7.4 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency programs.

As part of the SPOC model and ESA Program MF strategy, SoCalGas' ESA Program expanded its outreach to MF building owners and managers to gain connections within the non-profit affordable housing marketplace.

This effort began exploring how to better coordinate with "Deed Restricted" properties through the California Tax Credit Allocation Committee (TCAC). TCAC administers the federal and state Low-Income Housing Tax Credit Programs. This coordination is key due to the fact that deed restricted CAM participation is required per the D. 16-11-022.

In addition, the ESA Program continued to work closely with SoCalGas' EE team through the IDSM program, using the SPOC model to refine communication and coordination strategy. The objective is to make sure that customers, particularly multifamily ones, receive comprehensive services and incentives regardless of the customers' income qualification.

1.7.5 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response Programs including successes in Air Conditioning Cycling or other Demand Response Programs.

SoCalGas is not currently integrating ESA with Demand Response during PY2018. As natural gas Demand Response programs expand, SoCalGas will work to integrate with ESA, particularly through the smart thermostat offering.

1.7.6 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

In PY2018, SoCalGas increased its marketing efforts targeting low-income and disadvantaged communities. SoCalGas participated in over 20 outreach events which were targeted to low-income audiences and included giveaways and brochures regarding single-family rebates. In

addition, SoCalGas added media dollars to promote the higher incentive for single-family low-income customers in Out-of-Home advertisements (convenience store posters in targeted geographic areas) and on social media. All efforts aimed at low-income customers were in English and Spanish.

As part of the CSI Thermal Program, SoCalGas offers solar water heating rebates of up to $4,366 ($5,397 for low-income) to single-family homeowners, up to $800,000 to multifamily and commercial businesses, and up to $500,000 for solar pool heating systems for commercial and multifamily properties.

- SoCalGas processed to date 1,430 single family low-income applications, totaling $8.48M in incentives and equating to 182,000 in expected therms saved annually.
- For SoCalGas multifamily low-income customers, 52 applications were processed, totaling $2.4 M in incentives and equating to over 98,000 therms of expected annual energy savings.

1.7.7 Provide the number of referrals to the Single Family Affordable Solar Homes Program Administrator.

This section is not applicable to SoCalGas.

1.8 Workforce Education & Training

1.8.1 Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

SoCalGas worked with its Contractor Network to promote the growth of a trained workforce. SoCalGas enhanced its ESA Program workforce education and training by continuously improving the delivery and

offerings of its trainings of program services. SoCalGas utilized CBOs and private contractors to provide program services, including Enrollment and Assessment (E&A), Heating, Ventilation, Air Conditioning (HVAC), weatherization, and inspection services.

In PY2018, SoCalGas continued to take a much more inclusive and direct approach than in previous years to tailor the training provided to its contractors. By keeping the practice implemented in PY2017 of tracking and analyzing the types of questions sent in to SoCalGas' Enrollment Review Inbox, SoCalGas is able to identify the most common issues and questions being submitted not only overall but also by individual contractor. This allowed SoCalGas to tailor the refresher classes to make sure the most common issues were addressed. This also helped SoCalGas prepare for their contractor visits by arriving with answers and solutions to the most common type of errors or questions being submitted by their personnel. Also in PY2018, SoCalGas implemented the practice of having a "question box" at every refresher training where contractors could submit questions anonymously which were then addressed at the end of each training session. This tactic was successful in providing answers to questions that may not have been otherwise asked during the training. This information was also used to enhance the portions of the E&A training where Program Representatives had the most questions throughout the year. This method received positive feedback and has also

been incorporated into the initial E&A training where students are able to submit questions throughout the 4-day class which are addressed at the end of each day prior to the SoCalGas authorized ESA Program representative test being issued. SoCalGas will continue to use contractor questions as a tool to better assist and prepare the Program Representatives who enroll customers into the ESA Program.

As part of the ongoing effort to promote and develop its contractor workforce, SoCalGas partnered again with SCE to offer their respective contractor networks joint training of its ESA Program Mobile site. Providing joint training verified there was a consistent message to program representatives working for both utilities.

In PY2018, SoCalGas sustained its effort in enhancing the Energy Education curriculum by updating the Energy Wheel, a tool provided to contractors to assist in the delivery of In-Home Energy Education. This leave-behind item was updated to remove duplicate tips already contained in the Energy Education Resource Guide and to include additional energy saving tips and information for program representatives to use as supplemental resource. Also, the ESA Mobile site used to enroll customers was enhanced to provide program representatives information on whether the customer is currently enrolled in My Account. Having this information allows the program representatives to better tailor the Energy

Education provided to the program participants and to know up front if the customer should be offered enrollment to in My Account. SoCalGas will continue to provide My Account inserts to customers who are either enrolled or who have elected to opt-out. The insert not only provides step-by-step instructions on how to enroll into My Account, but it also informs customers of the benefits of using My Account, promotes paperless billing, and the additional resources available to customers through My Account to help them better manage their energy bills. The insert is yet another resource for the Program Representatives empowering them the ability to improve the quality of the In-Home Energy Education that program participants receive.

1.8.2 Please list the different types of training conducted and the various recruitment efforts employed to train and hire from the low income energy efficiency workforce.

In PY2018, SoCalGas continued to provide an array of training courses including initial E&A, In-Home Energy Education, Natural Gas Appliance Testing (NGAT), various refresher training, HEAT System, and ESA Program Mobile site training. These are all designed to provide thorough and technical training to its ESA Program workforce. While all training courses convey the importance of the utility-specific requirements and expectations for customer interactions with participants, each course also supported the development of expert ESA Program knowledge at all levels and stages, from front line to back office, and from newly hired to tenured personnel.

SoCalGas requires contractors to confirm that their employees are trained in the jobs that they perform. ESA Program services, including assessment, enrollment, installation of measures, repair and replacement of appliances and inspections are all provided by third party contractors. Thus, the students attending these training classes are hired by the ESA Program contractor network. Some Outreach Specialists are subcontractors to the ESA Program contractors and may not be direct employees. However, all potential Outreach Specialists must successfully pass the required SoCalGas training and the Department of Justice background check.

After successful completion of the Skill Level Test, potential Outreach Specialists attend a mandatory 4-day class which reviews the requirements for E&A. The 4-day class covers utility-specific items related to policies, security processes, and overall customer service standards, as well as leveraging opportunities among other low-income programs, and the Energy Education module. A final exam must be passed, as well as being issued an active Home Improvement Sales Registration with the California State Licensing Board before an Outreach Specialist is eligible to receive a SoCalGas badge. The classes are held at the SoCalGas ERC facility located in Downey, California, contractor's offices and offsite locations as requested by contractors.

SoCalGas field operations training includes initial training for new participants in weatherization, inspections, HVAC and NGAT. Additionally, SoCalGas provides refresher training primarily to address contractor issues and discuss new measures and procedures that have been implemented into the program. The class sizes range from 5 – 35 technicians. The contractor representatives are hired employees of the ESA Program contractors and are expected to arrive with the skill sets required to complete installation services. Installers are also given an informal aptitude evaluation in order to receive an identification badge to work under the SoCalGas ESA Program. This is in addition to a review of customer service standards and expectations.

In an effort to improve program delivery, SoCalGas provided its E&A contractors back office support and processing staff training through Enrollment Workshops offered throughout the year. SoCalGas hosts the workshops at its ERC facility. These sessions addressed important program updates, provided an overview of new program requirements, and served as a general refresher course for all participants. SoCalGas believes that these workshops improved the participants' understanding of the enrollment process and customer enrollment requirements. In addition to the E&A training, SoCalGas provides its entire contractor network HEAT System training. This training covers the data entry, processing and invoicing of customer enrollments in the program's database system

and is offered to both new personnel and tenured employees to provide consistency and reduce data entry errors in the system.

In PY2018, SoCalGas also provided in-office and contractor training to address issues affecting specific contractors back office personnel. Providing one-on-one support to the back-office helped SoCalGas understand their challenges and allowed SoCalGas to work closely with them to provide solutions. In-office trainings helps better assess contractor needs and tailor the trainings provided by SoCalGas to support the growth and development of the contractor workforce.

1.9 Legislative Lighting Requirements Status

SoCalGas is a gas-only utility, thus Section 1.9 is not applicable to the SoCalGas ESA Program.

1.10 Studies

1.10.1 For each Study, provide 1) asummary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.

Four statewide studies were proposed by the IOUs for the 2015-2017 ESA Program cycle following the procedures in the Guidance Document issued in D.14-08-030. These statewide, joint IOU studies were: 1) a Low Income Needs Assessment (LINA) study; 2) an Impact Evaluation of the 2015 ESA Program (Impact Evaluation); 3) a Non-Energy Benefits (NEB) and equity criteria evaluation; and 4) a Phase II ESA Program Energy Education study. D.16-11-022 authorized three of the proposed studies:

the LINA study, the Impact Evaluation, and the NEB study. The Phase II ESA Program energy education study was not authorized. The three authorized studies are discussed below.

TABLE 1.10.1 PROVIDES AN OVERVIEW OF THE PROPOSED 2015-2017 ESA PROGRAM STUDIES.

TABLE 1.10.1: 2015-2017 PROPOSED ESA PROGRAM STUDIES[1]

Proposed Program Studies	Lead Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report Due
Low Income Needs Assessment Study	Research Into Action	SCE	2/14/2018	TBD	12/31/2019
ESA Program PY2015-2017 Impact Evaluation	DNV GL	SCG	1/26/2017	4/8/2019	6/1/2019
Non-Energy Benefits and Equity Criteria Evaluation	SERA & Navigant	SDG&E	8/24/2018	Q2 2019	4/15/2019

[1] These studies were proposed in SoCalGas' 2015-2017 ESA-CARE Application and were authorized by D.16-11-22.

TABLE 1.10.1a: D.16-11-022 AND D.17-12-009 APPROVED STUDIES

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Budget	SoCalGas Budget [1]
2019 Statewide LINA	Research Into Action	SCE	2/14/18	12/2019	$500,000	$125,000
PY2015 Statewide ESA Program Impact Evaluation	DNV GL	SoCalGas	1/26/17	2019	$550,000	$137,500
Statewide NEBs Study	SERA	SDG&E	8/24/2018	2019	$150,000	$37,500
ESA Program Portion of the Statewide Energy Efficiency Potential Study[2]	Navigant	N/A	TBD	TBD	$300,000	--
Rapid Feedback Research & Analysis [3]	TBD	N/A	TBD	TBD	N/A	$200,000
Total					**$1,500,000**	**$500,000**

[1] This amount represents the total Joint Utility study budget, authorized in D.17-12-099. The authorized Joint Utility budget split for all studies is: PG&E--30%, SCE--30%, SCG--25%, and SDG&E--15%

[2] SoCalGas' portion of EE Potential Study will be funded from Rapid Feedback dollars, if needed.

[3] Rapid Feedback Research & Analysis is not a statewide study. Each IOU has its own budget with which to propose research.

Statewide Low Income Needs Assessment (LINA) Study

The LINA Study is mandated to be completed every three years per AB 327 and Public Utilities Code Section 382(d). During PY2018 the following activities have taken place: Research Into Action was selected to conduct the study in January 2018. SCE formalized the contract in January 2018. A project initiation meeting was held in February 2018. The final research plan was developed during Q1 of 2018. A public workshop on the draft research plan was held on May 3, 2018. Data collection plans and instruments were developed over the course of Q2-Q4 2018. Research into Action began collecting data in December 2018. The primary activities of the initial quarters of 2019 are expected to include additional data collection and preliminary analyses. The draft report is expected to be completed in August 2019 followed by a public workshop to review the results with the public and solicit stakeholder input. The current LINA study is on track to be completed by December 2019.

Statewide ESA Program Energy Savings Impact Evaluation

Current ESA Program impacts are necessary for planning the next program cycle, and following the direction of Energy Division, the IOUs issued an RFP to conduct the time-sensitive ESA Program impact evaluation in November 2015. The bid was awarded in February 2016, pending authorization of the study by the Commission. The contract for this work is held by SoCalGas and was finalized after D.16-11-022

authorized the study. DNV-GL is conducting the statewide ESA Program impact evaluation. Work began in 2017 and a study initiation meeting was held in February 2017. A public workshop on the research plan was held in September 2017. This study is taking a billing analysis approach to assess ESA program impacts for 2015 to 2017 program years. The results of this multi-year analysis will then be disaggregated into specific program measures. Phase 1 results were completed in June of 2018 and adopted into SoCalGas' ESA Mid-cycle update AL. Phase 2 results and the final report are due in 2019 and will be used for the post-2020 Application filing.

Statewide ESA Program Non-Energy Benefits (NEB) and Equity Criteria Study

The scope of work for the ESA NEB Study was developed in consultation with the ESA Cost Effectiveness Working Group in 2017 as directed in D.16-11-022. An RFP for the study was issued by SDG&E in March 2018 and Skumatz Economic Research Associates was chosen as the study contractor. A project initiation meeting was held on August 24, 2018 and a Draft Research Plan was presented during a public webinar on October 12, 2018. Results are expected in early 2019 and will be presented in a public webinar in Q2 2019.

D.16-11-022 and D.17-12-009 Evaluation Requirements

D.16-11-022 and D.17-12-009 identify the benefit of following guidelines established in the mainstream EE proceeding. Studies are required to solicit public input on research and deliverables via workshops or webinars and the CPUC's public documents area at energydataweb.com. Parties are encouraged to submit written comments on the work before and/or after the public meetings; these comments will be posted on the public document website. Notice of the public meetings will be sent to subscribers on the public document website and to the applicable service. Beyond the authorized studies, any additional studies or analyses commenced via the ESA Program Rapid Feedback and Analysis funding adhere to the project initiation and execution requirements outlined in Section 5 of *Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan Version 8*.

1.10.2 If applicable, submit Final Study Report describing: 1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.

No studies were completed in PY2018.

1.11 Pilots

1.11.1 For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

On June 18, 2018, SoCalGas submitted Advice Letter 5311 to the CPUC requesting approval for its proposed Smart Thermostat Pilot as part of the ESA Program. On December 19, the CPUC approved the implementation

of the smart thermostat as a standard measure of the ESA Program for SoCalGas through the end of 2020. Nonetheless, SoCalGas will still conduct the pilot to measure the appeal of the smart thermostat as the lead feature of marketing material to result in incremental enrollments in the ESA Program. The results of the pilot will be used to inform the future inclusion of the smart thermostat as a measure in the ESA Program after 2020.

The evaluation will leverage test and control groups to compare ESA Program call backs and enrollment rates of high usage low-income customers who did and did not receive marketing materials with the smart thermostat as the primary appeal. The evaluation will also compare My Account metrics between customers who receive a smart thermostat, and those who did not, to determine whether the smart thermostat increases engagement with online tools, such as Bill Tracker Alerts. Rollout is planned to begin at the beginning of Q2 2019, when contractors have been trained in the installation of the thermostat, and data collection will continue through the 2019/2020 winter season to capture the full effect of the measure. The pilot anticipates around 2,000 respondents. The target group of high usage low-income customers is ready for deployment of marketing material and will deploy when training of outreach and installation contractors are complete.

1.11.2 If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

This section is not applicable to SoCalGas.

1.12 "Add Back" Measures

For measures that fall below the cost effectiveness threshold under Decision 08-11-031, we require additional reporting to show the cost, energy savings impacts, and related metrics.

1.12.1 If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100% of eligible and willing customers will have received all cost effective Energy Savings Assistance Program measures, how does the IOU propose to address the shortfall in other parts of the Energy Savings Assistance Program?

The inclusion of "add-backs" in PY2018 treated homes did not impact SoCalGas' ability to reach customers or to install measures. Add-back measures were those that were not included in SoCalGas' proposed budgets because they had fallen short of the adopted cost effectiveness threshold, but were "added back" as part of the budget decision. For the 2017-2020 cycle, D.16-11-022 provided the opportunity to adjust budgets to accommodate ordered changes to the measure portfolio, including the retention of the duct sealing weatherization measure. Budgets for all current measures including add-backs were requested in SoCalGas' application and conforming Advice Letters and approved in D.16-11-022 and Resolution G-3532; thus add backs will not impact SoCalGas' ability to treat homes or install measures going forward.

1.13 Low Income Working Groups

D.16-11-022 re-convened the Cost Effectiveness and Mid-Cycle Working Groups and convened a new Multifamily Working Group. 2018 Working Group activity is summarized below.

Cost Effectiveness Working Group (CEWG)

D.16-11-022 instructed the CEWG to reconvene and address the tasks outlined below. The members participating in the Working Group include representatives from the following organizations: CPUC Energy Division, California Public Advocates Office (CalPA) formerly the Office of Ratepayer Advocates, National Resources Defense Council, The Utility Reform Network, TELACU/ACCES/Maravilla, Synergy Companies, SCE, PG&E, SoCalGas, and SDG&E.

CEWG Tasks:

- Submit a proposed schedule and work plan to the low-income proceeding service list no later than 60 days after the date of Decision approval;
- Provide recommendations on the following issues to be used to inform the next program cycle; these recommendations or a progress report are to be distributed to the service list no later than the second quarter of 2018;
    - Identify measures to include/exclude in the adjusted ESACET;
    - Determine how to exclude administrative costs and NEBs associated with excluded measures from the adjusted ESACET including program costs not tied to a specific measure;
    - Determine how to allocate administrative costs and NEBs across program measures;
    - Determine how to incorporate revised NEB values into the adjusted ESACET;

- Determine if and how to incorporate into the ESACET benefits and costs for ESA Program investment in other programs such as demand response; and
- Work with the IOUs to who will be conducting a NEB study.

The first item was submitted to the service list on January 11, 2017. The CEWG met monthly through 2018 both by teleconference and in person to discuss the topics in the second item. Final recommendations were submitted by email to all parties on the A.14-11-007 et. al. service list on June 13, 2018. The CEWG recommendations are summarized below:

- The CEWG recommends not adopting the Adjusted ESACET, as it has minimal value beyond the already adopted ESACET.
- The CEWG recommends changing the name of the Resource TRC test to the Resource Test and excluding from it non-resource measures which include those having less than 1 kWh or 1 therm of annual energy savings.
- The CEWG recommends providing the results of the allocation exercise for NEBs and administrative costs to the 2018 NEB study. That study is tasked with recommending an allocation method and the results of this exercise will inform that effort.
- The CEWG recommends not including any potential net benefit for providing enrollment leads to other programs in the cost effectiveness calculations at this time.
- The CEWG recommends continuing the Health Comfort Safety (HCS) Evaluation periodically as needed to inform program planning and NEB updates.
- The CEWG recommends the 2018 NEB study include the following objectives:
  - Review and update the current set of NEBs;
  - Evaluate which NEBs can be estimated directly and which can be a function of energy savings or an alternate adder;
  - Review and assess the results of the HCS Evaluation;
  - Recommend any missing NEBs or negative non-energy impacts;
  - Provide a set of calculations in a workbook that can replace the current workbook used to calculate NEBs and be easily updated in future

program cycles;

- Include sensitivity analysis around the calculations;
- Recommend an allocation method for NEBs and administrative costs to the measure level; and
- Recommend an approach for updating NEBs in the future.

In addition to these, the CEWG recommended that membership and participation protocols for the CEWG be reviewed and refined in the event that future work is assigned to this Group.

Mid-Cycle Working Group (MCWG)

D.16-11-022 tasked the MCWG with four deliverables:

a. Make recommendations for updates to the ESA Statewide Policy and Procedure Manual, California Installation Standards Manual, and monthly and annual reporting criteria to align it with D.16-11-022;

b. Provide recommendations on the adoption of online data reporting systems (ODRS) for the ESA Program to help the IOUs and Commission better understand how these systems collect and report workforce data. This assessment should help determine the value of adopting ODRS for the ESA Program into IOU operations, its cost-benefits, and identify any administrative burdens to implement by either contractor or utility;

c. Make recommendations for the household retreatment prioritization models, implementation and outreach strategies, and other aspects of the ESA Program;

d. Investigate and make recommendations on how the ESA Program may be used to deploy tools to enable greater EE and Demand Response participation by CARE and ESA Program participants in recognition of the increased State goals detailed in SB 350.

MCWG member organizations are: CPUC Energy Division, CalPA, California Housing Partnership Corporation, SCE, PG&E, SoCalGAs, SDG&E, Energy Efficiency Council, TELACU, and Proteus.

The MCWG submitted initial recommendations on April 3, 2017. A public webinar on updating the ESA manuals and reporting criteria was held on January 31, 2018. The MCWG Interim Report was submitted on March 19, 2018, providing the MCWG's recommendations for updates to the ESA Statewide Policy and Procedure Manual, California Installation Standards Manual, and monthly and annual reporting criteria to align it with Modified Decision (Task A). These changes were adopted in Administrative Law Judge Colbert's Ruling on May 8, 2018.

The MCWG filed its final recommendations on the remining deliverables (Tasks B-D) on June 29, 2018. These recommendations are summarized below:

- Task B: Based on the research conducted and MCWG participant discussions, the MCWG does not recommend the implementation of ODRS for the ESA Program for the reasons identified above.

- Task C: MCWG participants updated their ESA household retreatment prioritization models presented to the MCWG in April 2017. Following presentation and review of these initial proposals, the MCWG found that significant variations in retreatment prioritization models relate to best practices within each service territory, and the specific measures offered by each utility. Rather than developing a new retreatment prioritization model, there was consensus within the MCWG for the utilities to continue to prioritize ESA retreatments following their current models, document best practices and challenges, and update their retreatment prioritization proposals as needed in their Mid-Cycle Update Advice Letters, due in July 2018.

- Task D: MCWG participants reviewed current utility Demand Response offerings, and discussed how to integrate these offerings into the ESA Program. Parties were encouraged to provide additional recommendations for best practices to enable greater Energy Efficiency and Demand Response participation in response to the IOU's July 2018 Mid Cycle Update Advice Letters.

Multifamily Working Group (MFWG)

The MFWG was established to support the integration of common area measures for deed restricted MF properties into the ESA Program and other MF directives as specified in Decision 16-11-022. SoCalGas participated in the MFWG throughout 2018.

MFWG member organizations include: CPUC Energy Division, CalPA, SCE, PG&E, SoCalGas, SDG&E, California Housing Partnership Corporation, Natural Resources Defense Council, National Consumer Law Center, Community Housing Opportunities Corporation, TELACU, and Proteus.

The MFWG detailed its 2018 activities in the MFWG 2018 Annual Report.[21]

Demand Analysis Working Group

D.17-12-009, OP.8 identified a Demand Analysis Working Group (DAWG) to act as the established forum for providing input into the scope, modeling and analysis of results associated with the Energy Efficiency Potential Study (EE Potential Study). There was no low-income activity in the DAWG in 2018.

Low-income energy efficiency was included in the 2017 EE Potential Study as an input – i.e., the study did not identify optimal levels of low-income EE savings to

[21] Available at https://pda.energydataweb.com/#!/documents/2120/view

pursue. This was due to resource constraints within the 2017 EE Potential Study. More detailed modeling of low-income energy efficiency is planned to be included in the next 2019 EE Potential Study, which uses the DAWG for stakeholder engagement and review of the study. The 2019 EE Potential Study is due on May 1, 2019.

1.14 Annual Public ESA Program and CARE Meeting

D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of their filing of the annual report, and other public meetings as deemed necessary by the IOUs, the ED, the ALJ, or the Commission. Additionally, IOUs were directed to use these meetings as a forum to host the working groups.

In compliance with D.12-08-044, SoCalGas and the other IOUs held a public forum in San Francisco, California on June 26, 2018. There the IOUs presented an overview of their 2017 ESA and CARE Program results.

1.15 Multifamily Properties

1.15.1 The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation, and time since the last retrofit of non-deed restricted multifamily properties with a high percentage of low income tenants.

SoCalGas submitted its Statement of Work (SOW) on September 24, 2018 to conduct and report on its analysis of non-deed restricted multifamily properties with a high percentage of low income tenants. SoCalGas

submitted an updated SOW, dated December 31, 2018, to clarify additional details about the analysis approach and update the included timeline. SoCalGas' SOW outlined its approach which included:

- Using its Geographic Information Service (GIS) to conduct an analysis of parcel information within the service territory to determine multifamily square footage. GIS allows SoCalGas to utilize several geospatial tools (overlays, spatial calculators, near assessments, etc.) to gain additional insight into third-party parcel land base data which is compiled by a third party vendor using parcel and tax roll data.
- Defining MF parcel type using parcel attribute information from the database.
- Utilizing customer-specific information for accounts with five or more units from SoCalGas' internal databases including energy consumption, ESA Program participation and time since last retrofit.
- Overlaying with eligible zip codes for low-income areas.

Results were presented to the MFWG on March 15, 2019 as follows:

- 73,638 bill accounts were identified from SoCalGas' Customer Information System serving multi-family common areas and master meter properties along with the following:
  - 12-month total therm usage in 2018
  - 12-month average bill amount
- From the bill accounts above, their property addresses were overlaid against real estate database from a third-party to gain facility information including:
  - Number of buildings and/or units
  - Square footage by building
  - Number of bedrooms
  - Number of bathrooms
- The building property addresses were also geocoded for small census tract regions instead of the much wider ZIP code areas to approximately match against the census tract poverty percentile from CalEnviroScreen 3.0 (CES)[22] by CalEPA.

[22] CalEnviroScreen 3.0 Report, January 9, 2017. California Environmental Protection Agency.

- SoCalGas' ESA Program database, HEAT, was used to determine prior program participation.

Subsequent analysis to scrub the data and apply the poverty percentile from CES yields 18,318 remaining properties that can be identified as MF low income non-deed restricted. From the original list of active gas bill accounts associated with all MF properties above, about 25% were identified as non-deed restricted properties. For comparison, this percentage closely aligns with the criteria we have selected for census tracts that have more than 75% of the population living below twice the federal poverty level.

Below are two summary tables showing SoCalGas' 2018 annual analysis of MF low income non-deed restricted properties. This analysis requires a multi-step process to scrub the data including missing data, duplicate data, non-active/closed accounts, invalid/mismatched information, or unable to be matched due to nonstandard address designations and aligning CIS with GIS. Only data that was able to be matched was utilized for this analysis. SoCalGas will continue to work with the MFWG to refine the analysis and leverage these results, as necessary.

SoCalGas Multi-Family Low Income Non-Deed Restricted Property Analysis

Category	All MF Properties				Central Facility[23]		Master Meter	
	Number of Properties	Avg Sq. Ft.	2018 Annual Therms ('000)	Therms per Property	2018 Annual Therms ('000)	Energy Use Intensity (Therms / Sq. Ft)	2018 Annual Therms ('000)	Energy Use Intensity (Therms / Sq. Ft)
Has Sq. Ft. Data	15,457	19,955	50,998	3,297	27,079	0.14	23,875	0.21
Sq. Ft. Data Missing	2,861	N/A	5,459	3,936	4,424	N/A	6,873	N/A
All properties	18,318		54,447	3,396	31,503		30,713	

ESA Program Participation

Year Last Treated	# Properties Treated through ESA
2010	57
2011	89
2012	50
2013	78
2014	174
2015	132
2016	154
2017	287
2018	227

1.15.2 Describe coordination efforts with the California Advanced Services Fund's new Broadband Public Housing Account.

Potential coordination efforts with the California Advanced Services

Fund's Broadband Public Housing Account will be considered in 2019.

[23] A meter that provides gas service to one or more units for baseline and/or non-baseline usage. The units are or can be individually metered.

2. CARE EXECUTIVE SUMMARY

The SoCalGas CARE Program, formerly known as the Low Income Ratepayer Assistance Program (LIRA) was established through a legislative mandate and was implemented by the Commission in D.89-07-062 and D.89-09-044. The Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in 1992. The program was further expanded to qualified agricultural employee housing facilities in D.95.10-047. In PY2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since PY2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines (FPG).[24] In PY2010, the legislature enacted Senate Bill (SB) 695 which changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE Program should be no greater than 200% of the FPG. In PY2006, the Commission authorized the utilities to implement: 1) CE which allowed customers to qualify for CARE based on their participation in certain state or federal public assistance programs; 2) four-year recertification for low-income customers with a fixed income; 3) a process to enroll certain prospective CARE qualified households by telephone; 4) a process to allow all customers to recertify their CARE eligibility through the IVR system; and 5) internet-based CARE enrollment and recertification.

[24] *See* D.05-10-044, Ordering Paragraph 1, at pg. 35.

In D.08-11-031, the Commission expanded the list of CE programs to further align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population.

Annual funding for 2017 through 2020 was authorized in D.16-11-022, and updated via Resolution G-3532 addressing SoCalGas' conforming Advice Letters AL 5111-A and 5111-B.

This report provides information on SoCalGas' CARE Program accomplishments and expenditures for PY2018. At year-end of PY2018 the CARE Program had enrolled over 311,911 new customers and ended PY2018 with a penetration rate of 90.06%. Notable achievements of the CARE Program enhancements in 2018 include:

- In February 2018, implemented real-time enrollment through CSRs during turn-on and payment extension calls;
- In March 2018, SoCalGas implemented CARE vs. non-CARE energy rate comparisons in the monthly direct mailers to customers not on the CARE rate.
- Implemented CARE enrollment, recertification and PEV via My Account;
- Implemented real-time CARE enrollment of on-line applications via the SoCalGas CARE website;
- Continuation of the Mobile Home Park Utility Upgrade Program and seamless transfer of CARE and MBL benefits to the tenants' new gas accounts;
- Implemented the automatic mailing of a monthly listing of CARE tenants to the mobile home parks, for accurate billing of their tenants;
- Continued best practices in CARE scanning operations for efficiency and accuracy of application processing;

- Finalized discussions with CPUC and IOUs on data transfer of CARE customer information to CPUC Lifeline administrator; and
- Sent out the Home Energy Report to 156,000 customers.

D.16-11-022 provided several directives to the IOUs. For PY2018, SoCalGas continued to update My Account and mobile device/apps. The My Account updates provide all non-CARE residential customers ability to be informed of the CARE Program and offered a facilitated enrollment process if they choose to apply. Additionally, CARE customers continue to be informed of their CARE status, reminded/facilitated to recertify their CARE eligibility, reminded/facilitated to upload required proof of eligibility documentation if PEV is required.

For PY2018, SoCalGas continued the current marketing practice of targeting likely eligible customers based on internal analytics. Zip codes and penetration rates are used to identify enrollment gaps and specifically target potential new customers, those who need to recertify and those who need to re-enroll. SoCalGas leveraged its existing SoCalGas mobile app to increase connections, which is critical in cross-promoting all company programs and services. CARE customers who use the mobile app are exposed to other beneficial programs. SoCalGas' customers are able to apply for CARE and recertify their CARE eligibility in five different languages. All forms are accessible and responsive to mobile devices. In addition, linking the current CARE website to SoCalGas' mobile app landing page menu provides more exposure for the program.

SoCalGas continues to work towards meeting the CPUC directed CARE Program goals and objectives. Results for PY2018 are provided in the sections below.

2.1 Participant Information

2.1.1 Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants

CARE Residential Program Customers by Month		
Month/Year	**Customers**	**% Change**
Jan-18	1,565,982	0.12%
Feb-18	1,568,876	0.18%
Mar-18	1,579,342	0.67%
Apr-18	1,584,655	0.34%
May-18	1,597,859	0.83%
Jun-18	1,606,015	0.51%
Jul-18	1,608,407	0.15%
Aug-18	1,611,312	0.18%
Sep-18	1,614,923	0.22%
Oct-18	1,617,107	0.14%
Nov-18	1,616,986	-0.01%
Dec-18	1,615,527	-0.09%

2.1.2 Describe the methodology, sources of data, and key computations used to estimate the utility's CARE penetration rates by energy source.

SoCalGas and the other IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly penetration estimates in PY2018. This method entails annual estimation of eligibility for CARE, the ESA Program, and other income-by-household size parameters at the small area (e.g., block group, census tract, and ZIP+2) for each IOU territory and for the state as a whole.

In 2009, the method was augmented to better incorporate the impact of labor force changes including unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession. The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey Data, and California Employment Development Department county and Metropolitan Statistical Area level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise "standard" estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

In 2012, Athens Research developed an improved method for estimation of payer status-specific eligibility. This method took into consideration the American Community Survey microdata relationships between guideline status (above/below 200 percent of FPG), tenure, and fuel payment relationships. These cross-classifications are fitted to small area (block group) marginal to produce payer type-specific distributions, which can be aggregated to various other geographical levels.

The requirements for 2018 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS)

Poverty Guidelines [Federal Register / Vol. 83, No. 12 /Thursday, January 18, 2018 /Notices; p.2643], "bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327.

Sources for the estimation include the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census 2010 SF3 data, Census American Community Survey 2012-2016 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, SoCalGas applies county/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic eligibility in household count form.

SoCalGas counts the number of households (by small area, by county, and overall) that are enrolled in CARE on a monthly basis. The CARE

household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

2.1.2.1 Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology, as described above, was used throughout PY2018.

2.1.2.2 Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service)

CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered dwelling units only. Non sub-metered master meters and other meters that do not provide residential service are not included in the "technical eligibility" meter counts.

2.1.2.3 Discuss how the estimates of current CARE-eligible households were developed

See response above to Section 2.1.2. Each quarter (January, April, July and October), SoCalGas applies the county and utility eligibility rates to its current set of CARE-eligible meters that includes both individually and sub-metered housing units. Once the factors are applied, estimates for CARE eligible-households by county were developed. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and

connecting these estimates with small area counts of households that are individually metered or sub metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area such as ZIP+2, ZIP, tract, county, and territory.

2.1.2.4 Describe how current CARE customers were counted.

Currently, CARE customers were counted by totaling the number of individually metered residential customers plus the number of sub-metered tenants receiving service through residential master-metered accounts receiving CARE discount at the time.

2.1.2.5 Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

The formula for calculating CARE-participation is:

$$\frac{\text{Number of CARE Customers}}{\text{Number of Estimated CARE-Eligible Households}}$$

2.1.3 Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

SoCalGas is a single energy source utility for natural gas. At year-end PY2018, of SoCalGas' 1,793,870 CARE-eligible meters, 32.09% or 5,589,784 households were estimated to be eligible for the CARE discount.

2.1.4 Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

At the end of PY2018, SoCalGas had 132,558 sub-metered tenants in 1,607 master-meter facilities. Assuming, by the methodology described above, 52.05% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 69,003 of its sub-metered tenants are CARE eligible.

2.1.5 Provide the current CARE sub-metered tenant counts by energy source at year-end.

As of year-end PY2018, SoCalGas had 33,207 sub-metered tenants participating in the CARE Program.

2.1.6 Provide the current CARE sub-metered penetration rates by energy source at year-end.

SoCalGas estimates 48.12% of its CARE eligible sub-metered tenants were enrolled in the CARE Program as of the end of PY2018.

2.1.7 Discuss any problems encountered during the reporting period administering the CARE Program for sub-metered tenants and/or master-meter customers.

In PY2018, SoCalGas did not encounter any major problems in administering the CARE Program for sub-metered and/or master-metered customers. Implementation of real-time enrollment of regular residential customers via My Account eliminated sub-metered tenants' ability to enroll via the web, as they do not have a SoCalGas account number, necessary for My Account registration. Both My Account and socalgas.com web applications became real-time by means of the IVR CARE Web Service which does not support sub-metered accounts. This

web based logic uses Bill Account Number and ZIP code to locate customers' addresses. Although manageable, the change resulted in an increase in paper applications. SoCalGas is proposing a future web enhancement for sub-metered tenants to enroll by using the master-meter account number and the tenant's space number. The enhancement would result in real-time enrollment and would virtually eliminate follow-up corrections to web enrollments.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs

CARE Budget Categories	Authorized Budget[1]	Actual Expenses	% of Budget Spent
Outreach	$4,004,885	$3,712,959	92.71%
Proc., Certification and Verification	$2,966,518	$1,505,054	50.73%
Post Enrollment Verification	$154,833	$112,060	72.37%
Information Tech./Programming	$1,037,796	$927,047	89.33%
CHANGES	$437,502	$336,933	77.01%
Measurement and Evaluation	$0	$0	0.00%
Regulatory Compliance	$475,858	$384,841	80.87%
General Administration	$953,729	$907,687	95.17%
CPUC ED Staff	$60,000	$24,410	40.68%
Cooling Centers	N/A	N/A	N/A
Total Expenses	**$10,091,122**	**$7,910,991**	**78.40%**
Subsidies and Benefits	**$132,351,979**	**$111,634,300**	**84.35%**
Total Program Costs and Discounts	**$142,443,101**	**$119,545,291**	**83.92%**

[1] Reflects the authorized funding per year in D.16-11-022 and updated via Resolution G-3532 addressing conforming Advice Letters 5111-A and 5111-B.

2.2.2 Please provide the CARE Program penetration rate to date.

CARE Penetration Year-end 2018			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,615,527	1,793,870	90.06%	Yes

2.2.3 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, and the nature of the complaints.

Month	Complaints Received	Nature of Complaint	Cases Resolved
March	1	The CSR stated, "Customer claims she mailed her CARE application in November. She says she was recently terminated from CARE and wants to be retro-active for her discount." Customer was rebilled on CARE from January 1st. Customer was satisfied.	Yes
April	1	The CSR stated, "Customer would like to suggest that the company make better attempts at reaching out to customers who do not have CARE or have previously had CARE and failed to recertify." Although this was "for information only", the customer was contacted to inform him that SoCalGas notifies customers about the CARE program in the form of an annual bill insert and also through quarterly bill messages; CSRs enroll customers in CARE when customers call to turn-on service, or make payment arrangements; CARE information is provided in My Account where customers can enroll, recertify, or verify one's eligibility; outreach workers go door-to-door to enroll customers in CARE. Regarding recertification, once an application is mailed, the customer receives an automated call informing him that it is time to recertify and to expect an application in the mail. The application provides several options for completing the recertification process: mail or fax the completed application, call the toll-free phone number and follow the interactive voice response prompts, log into My Account, or recertify at socalgas.com. Customer appreciated the call and the information provided.	Yes

July	1	Per the Customer Contact Center, "Customer called the CCC to request a Supervisor Callback. Customer was removed from CARE in December 2017 due to not returning her recertification documents. Customer claims we never sent the documents. Customer also states that she was told by multiple employees at the Branch Office that she was on CARE and to not worry about any paperwork. Due to her disability, she would like CARE to be reinstated the date she was terminated." Customer recertified her eligibility and was reinstated on CARE as of the termination date. Customer was pleased with the outcome.	Yes
October	1	The customer stated she had difficulty with the recertification interactive voice response system. A CARE representative called the customer and recertified her CARE eligibility over the phone. The customer was satisfied.	Yes

2.3 CARE Program Costs

2.3.1 Discount Cost

2.3.1.1 State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

The average monthly discount received per SoCalGas' CARE customer in PY2018 was $5.53[25] per month.[26]

2.3.1.2 State the annual subsidy (discount) for all CARE customers by energy source.

SoCalGas' CARE customers and expanded CARE customers (i.e., farm and migrant workers and those living in non-profit group living facilities or agricultural housing) received $108,348,466 in

[25] The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2017 by the monthly residential CARE customers: the total of the 12 months was then divided by 12 for the average monthly CARE discount per customer.
[26] This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

natural gas rate discounts and $3,285,834 in Service Establishment Charge (SEC) discounts in PY2018. The PY2018 annual subsidy for all SoCalGas CARE customers was $111,634,300.

2.3.1.3 Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

This section is not applicable to SoCalGas.

2.3.2 Administrative Cost

2.3.2.1 Show the CARE Residential Program's administrative cost by category.

See section 2.2 or CARE Table 1 in the attachments.

2.3.2.2 Explain what is included in each administrative cost category

Marketing & Outreach: This category includes costs for the printing and mailing of CARE applications recertification requests, post enrollment verification requests, monthly sub-metered unit lists, and correspondence, the printing and mailing of SB 920 annual notification,[27] postage, bill inserts, brochures, flyers, advertising, direct mailing campaigns, web campaigns, social media, third party outreach, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments and any agency-related outreach support efforts are also included

[27] SB 920 requires that homeowners and residents of a master-metered park receive notification in their utility billing statement of the assistance available to them under the CARE Program. This notification must be received on or before February 1 of each year.

in this category. Capitation payments are compensation fees paid to CBOs that assist SoCalGas in enrolling hard-to-reach CARE-eligible customers in the program.

Processing, Certification and Re-certification: This category includes costs for CSR CARE enrollment, the CARE Processing Group labor and document scanning costs. The function of the CARE Processing Group includes: 1) opening and sorting CARE application forms; 2) processing CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications and/or the program; 4) tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting; and 5) SoCalGas' CARE forms scanning operation costs.

Post Enrollment Verification (PEV): CARE eligibility verification costs are tracked separately. This category includes staff labor costs for processing the verification applications and supplemental documentation, handling verification-related calls, and training.

Information Technology (IT) Programming: This category includes IT labor and contractor costs to maintain the SoCalGas CARE application billing system, CARE IVR applications, CARE

on-line applications, CARE functions in CSR enrollment, My Account, CARE documents, CARE database, system reports, data exchanges with other utilities, charges to conduct system enhancements to comply with Commission mandates, and improvements in operational efficiency.

CHANGES: This category includes costs related to the CHANGES Permanent program billed by the CPUC.

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates. There was no billing from PG&E in 2018 for this joint utilities study.

Regulatory Compliance: These costs include labor and non-labor costs for the preparation and filing of various regulatory filings including: program applications, AL filings, comments and tariff revisions, preparation of monthly/annual reports, studies, attendance at working group meetings, public input meetings, and other Commission hearings or meetings.

General Administration: This category includes costs for program management labor, office supplies, market research, and general business expenses.

<u>Commission Energy Division Staff Funding</u>: This category includes costs incurred by Energy Division staff in support of the Commission's authorized low-income programs.

2.3.3 Provide the year-end December 31 balance for the CARE balancing account.

At year end of PY2018, the CARE balancing account was over-collected by $38,822,874.

2.3.4 Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

The recorded costs in the CARE balancing account include the SEC discounts, all rate discounts, surcharge revenues, amortization, interest, and administrative costs (as described in Section 2.3.2.2). The costs recorded in the CARE balancing account are not included in base rates.

2.3.5 Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

See CARE Table 10 in the attachments.

2.4 Outreach

2.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf including Lifeline coordination.

In PY2018, SoCalGas continued to use both traditional communication and grassroots tactics to extend awareness and participation in the CARE Program. Traditional tactics include mass media advertising purchases, direct mail, email, bill inserts, door-to-door canvassers, and participation in community outreach events. In addition to these traditional tactics, in PY2018, SoCalGas worked with CBOs to help with outreach of the CARE

Program and promote awareness in order to increase enrollment with mainstream customers while continuing to expand awareness to hard-to-reach customers. These CBOs serve specialized markets and help SoCalGas enhance awareness of the CARE discount to communities. As an example, in PY2018, SoCalGas partnered with Saint Barnabas Senior Services (SBSS) an organization that has worked with seniors in Los Angeles County for over 100 years and currently works with over 18,000 seniors. SBSS has been serving aging and economically vulnerable people residing in Los Angeles, excelling in their mission to empower a diverse community of older adults to Live Well, Feel Well, and Age Well in the community with dignity and respect. As a model agency widely recognized for innovative programs, SBSS is creating transformative change in the lives of vulnerable seniors, and continues to be a pioneer in providing comprehensive services of high integrity and value in Los Angeles. SoCalGas has trained SBSS Staff/Case managers on the Customer Assistance Programs as well as had an information booth at three of their annual events (Aging into the Future, Los Angeles Aging Advocacy Coalition Summit on Aging and Intersection of Health, Housing & Services Conference) where Customer Assistance Program information was distributed to attendees. In 2019, plans to continue to work on the three annual events as well as additional work in other areas of service including congregate meal sites, and tech lab opportunities are being discussed.

Ethnic Media: Ethnic media plays a critical part in communicating with hard-to-reach customers. For example, SoCalGas has an ongoing advertising contract with Radio Campesina (KMYX, Bakersfield & KUFW, Visalia) to increase awareness of Customer Assistance Programs, especially among farmworkers and undocumented residents with LEP. These demographic customers can be less trusting of utilities or government sponsored programs due to the risk of exposure, and are less likely to accept programs or services. By partnering with Radio Campesina, SoCalGas is able to reach these customers through a trusted community partner and in their language. The radio schedule consists of short, 30 second Spanish language ads that run several times a day.

In addition to the radio spots, SoCalGas' relationship includes participation in community events sponsored by the station such as farmworker lunch promotions, school programs, holiday giveaways, and several hosted "classrooms" of the month throughout the year. SoCalGas' branded "Low-Income Programs" giveaways and bilingual collateral are distributed to inform the community, children in the classrooms, and farmworkers in the fields. These events promote awareness of SoCalGas, specifically to children who can be the primary cultural navigators in mono-lingual Spanish speaking homes.

Mass Media: SoCalGas kicked off the CARE Campaign during the month of June. Media tactics focused on digital and highly targeted outdoor channels. The campaign began running on June 18 and ran through November 4. The tactics included digital/mobile, paid social media, SEM, and out-of-home, and the program messaging was communicated in both English and Spanish to reach non-English language customers. The goals of the media campaign were to raise awareness of the CARE Program, inform customers of the new online CARE application, drive targeted audiences to the CARE Program page to enroll, and increase CARE penetration to 90%. All impressions were geo-targeted only to the top 30 zip codes identified to have a high percentage of eligible customers. Additionally, SoCalGas ran these campaigns in the Los Angeles, Orange, Riverside, San Luis Obispo, Kings, and Santa Barbara County areas.

Direct Mail: Direct mail continues to be a versatile and effective method for enrolling CARE customers. Generally, direct mail campaigns target customers with a probability of being eligible for low-income programs who meet the following criteria: CARE customers who have fallen off of the program and need to re-enroll, CARE customers who are nearing the end of the program term and need to recertify, new customers eligible for CARE, existing SoCalGas customers who are not on CARE and CARE customers who have recently changed residence. Tools such as PRIZM codes are utilized to help identify these customers.

During PY2018, an average savings value while on the CARE Program for two years and the new online application were added to the letters. These letters contained two banners: "Average savings on CARE $145" and "New online application. Process your request instantly." The average value message intended to help customers understand the savings potential differently, and the online application message intended to drive customers to apply online. For the customer's convenience, income guidelines along with the application were also included in the mailing.

In PY2018, SoCalGas continued to conduct annual SB 920 targeted mailing (see Section 2.3.2.2. above) to master-metered facilities with sub-metered tenants to remind them of their responsibility to notify their tenants about the CARE Program discount available to them. SoCalGas continues to maintain compliance with Assembly Bill (AB) 2104 by mailing out the monthly *Add & Delete Report* to notify owners/managers of sub-metered facilities of any tenants who have been added to CARE or removed from the program. Lastly, SoCalGas maintains compliance with AB 2857 by approving eligible sub-metered tenants who live in facilities that are not 100% sub-metered.

Bill Message: During PY2018, quarterly CARE bill messages were printed in both English and Spanish on non-participating customers' bills. Additionally, when applicable, CARE bill messages were sent out 45 days

after the PEV letters were mailed to remind customers that SoCalGas had not received their verification application and proof of income. Further, if there was no response from the customer after 120 days, SoCalGas sent those customers a bill message informing them that they had been removed from the program.

Quarterly CARE messages were also added to the outgoing envelopes used to mail customers' natural gas bill.

Bill Inserts: Bill inserts continue to be a low-cost method to create program awareness and encourage enrollment. The inserts/applications are bilingual in English and Spanish and contain basic program information. In June of 2018, SoCalGas sent out a bill insert to approximately 3.3 million residential customers. The bill insert announced the annual eligibility guidelines. In September of 2018, SoCalGas also sent out a bill insert to approximately 251,950 commercial customers. The latter bill insert described the CARE rate for commercial facilities such as non-profit group living and migrant farmworker housing.

Cross Program Promotion: Communication and outreach opportunities were sought out to cross-promote the CARE Program with other Customer Assistance Programs and EE programs to maximize customer value and reduce costs. The ability to apply for CARE through SoCalGas' ESA

Program applications made it easier for customers to obtain services and other SoCalGas assistance program information simultaneously. Customer information obtained from SoCalGas' ESA Program and GAF, along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes. Certain collateral materials used by SoCalGas' Outreach department and field operations personnel have been specifically designed to provide customers with information on all available low-income and special needs customer programs and services. Field Operations is instructed to leave customer assistance program information material in English and Spanish every time a customer's home is entered for services.

SoCalGas.com Website: The SoCalGas website (www.socalgas.com) is a 24/7 communication and enrollment channel for the CARE Program. Monthly email blasts consisting of targeted electronic newsletters and emails promoting the CARE Program direct the customer to the socalgas.com website. All mailed applications also provide the option to apply online at socalgas.com. Customers can enroll in the CARE Program online using English and Spanish applications. In addition, customers who are already on CARE and receive a reminder via email or a letter to recertify their eligibility are directed to the website where they may recertify online. SoCalGas offers a total of five online applications in the following languages: English, Spanish, Chinese, Korean, and Vietnamese.

SoCalGas also offers downloadable CARE applications in Large Font size for those with visual disabilities as well as in the following 13 languages: English, Spanish, Chinese, Korean, Vietnamese, Armenian, Arabic, Hmong, Farsi, Khmer, Russian, Tagalog, and Thai.

Customer Contact Center (CCC): While customers are on hold to speak to a CSR, the IVR system informs them about CARE and other assistance programs. In February 2018, CSRs began offering immediate CARE enrollment to customers who call to start new gas service, or make payment arrangements, which resulted in more than 140,000 new enrollments. For customers who prefer to receive an application in the mail, CSRs initiate that mailing. CSRs also provide information regarding Customer Assistance Programs to facilitate enrollment of eligible customers.

Bilingual Employees: The CCC, CARE Customer Support Center, and most company business offices continued to be staffed with bilingual (English and Spanish) representatives. Vietnamese, Korean, Mandarin, and Cantonese telephone lines are staffed from 8:00 am to 5:00 pm, Monday through Friday, at the CCC. Deaf and hearing impaired customers may also contact the CCC through its TTY/TDD equipment 24 hours a day, seven days a week. Additionally, SoCalGas' call center is equipped to provide services in 240 languages through the *Language Line*

Service, a third-party interpreter service which is available 24 hours a day, seven days a week. For hearing impaired customers, a toll-free number is also provided.

Branch Payment Offices (BPO): English and Spanish CARE applications and program information brochures are available in all BPOs, and the CARE Program is promoted during every transaction. Furthermore, English and Spanish CARE posters that are complete with program guidelines and helpful information are on display in each BPO. These posters are revised as program information and income guidelines change.

Community Events: During PY2018, SoCalGas personnel participated in general and low-income specific community events. The goal of each event was to generate awareness of and increase participation in Customer Assistance Programs. SoCalGas has strived to use events and event sponsorships to extend messaging with its communities and as opportunities to work with other organizations so that residents and customers get maximum value from attending. Key events in PY2018 included: 15th Annual Telemundo 52 Health Fair, 37th Annual Tet Festival, Abilities Expo, CicLAvia (San Fernando Valley, 100 X Phil), Southern California Edison Black History Month Celebration, Indio Senior Center Health and Wellness Fair, Cucamonga Valley Water District Annual Earth

Day Event, LGBT Center Los Angeles Veteran Stand Down, Older Adult Summit, LA County DPSS Cal Fresh Training Course, Golden Future 50 + Expo, New Environment Leaders of America (NELA) Annual Earth Day Event, Upland Lemon Festival, American Indian Chamber Expo, Metropolitan Water District Spring Green Expo, Lancaster Jethawks and Grace Resource Center Christmas in July, Crenshaw Chamber of Commerce Jazz Appreciation Festival, Reach for the Stars Tardeada with Telemundo's 52 Dunia Elvir, West Riverside Council of Government Membership Quarterly Meeting, APIDC Walk-N-Roll, Pow Wow Dominguez Hills, Fiesta Educativa Annual State Wide Multicultural Disability Conference, LADWP Earth Day LA at Grand Park, and Long Beach Veterans Affair Blind Rehabilitation Center Open House and Wellness Event.

Third-Party Outreach: In order to improve its efforts to communicate with hard-to-reach customers, SoCalGas has contracted with vendors to perform door-to-door outreach.

Community-Based Organizations (CBOs): In PY2018, SoCalGas continued its grassroots outreach efforts. The primary driver has been to establish relationships with Faith-Based Organizations (FBOs) and CBOs

in order to enroll hard-to-reach customers. Below are key partners from PY2018.[28]

- **211 LA County:** Customer Assistance Programs and service information continue to be added to the growing California 211 information and referral network. 211 LA County provides social and support services to assist those in need which are mainly low-income residents. SoCalGas works very closely with 211 LA County so that the CARE Program is a key component of the operator's assessment of the caller's needs. During PY2018, SoCalGas continued working with these organizations, but also added several key partners to expand awareness.

- **Fiesta Educativa:** Fiesta Educativa is an organization that provides information and training to Latino families on how to obtain services for all persons with disabilities. In addition, training is provided to professionals who work with these families. Fiesta Educativa's efforts include an annual statewide conference providing more than 1,000 parents with information in English and Spanish on such topics as resources, patient and client rights, educational and vocational programs, and stress management for families, as well as the sponsorship of several regional conferences throughout the state. Fiesta Educativa has added SoCalGas Customer Assistance Programs to their topics discussed at their training programs, resource centers and conferences. Additional services include a home-based parent education and training program "Fiesta Familiar," and an advocacy and outreach project assisting families and persons with disabilities to make the best use of the agencies and resources available to them in their communities.

- **Santa Barbara County Food Bank:** In order to expand awareness of Customer Assistance Programs in the underserved areas of Santa Barbara County, SoCalGas initiated its relationship with the

[28] List of organizations in PY2018 include: 211 LA County, Abrazar, APIDC, Arc Foundation, Asian American Resource Center, Bienvenidos Community Health Center, Boys and Girls Club OC/Santa Ana, Breathe LA, California Council of the Blind, Casa 0101, Catholic Charities OC, Self Help for the Elderly, California State University Northridge, Disability Rights Advocates, Fiestiva Educativa, FIND, FOOD Share, Foundation of the Junior Blind, Grandma's House of Hope, Inner City Law Center, LA OIC, LA Prensa Hispana, LIFT, Little Saigon TV Network, LLS, LMG, MAOF, Mariachi Foundation, MICOP, North Valley Caring Services, OC 211, OCAPICA, Campensina Radio Network, RHF Bunker Hill Corporation, Disability Rights Advocates, Santa Barbara Food Bank and Senior Services, Second Harvest, Senior Serve, Service Center for Independent Life, Southern California Rehabilitation Services, Spanish Town Heritage Foundation, St Vincent's Meal, Unity Shoppe, UVSA, Via Care, Westside Center for Independent Living, Worksite Wellness.

Santa Barbara County Food Bank. The Santa Barbara County Food Bank conducts ongoing CalFresh outreach in the county. Because participation in CalFresh allows customer enrollment in the ESA Program and CARE through CE, SoCalGas began working with the Santa Barbara County Food Bank. This relationship is similar to the relationships with food banks in other counties such as described above.

- **Unity Shoppe:** SoCalGas began working with Unity Shoppe, a CBO in Santa Barbara County. The organization serves low-income families, children, seniors, and persons with disabilities. Since each person served undergoes an assessment process by the organization, it is an opportunity to increase awareness of SoCalGas' Customer Assistance Programs.

Capitation Contractors: SoCalGas worked with 38 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2018. These "CARE Capitation Contractors" are located throughout the SoCalGas service area and employ various types of outreach strategies, such as local community event participation, walk-in enrollment, and program material distribution to enroll customers.

Lifeline: SoCalGas met with one of the providers to begin discussions on providing information to CARE Customers on Lifeline services. In addition, SoCalGas began discussions with the IOUs and ED regarding data sharing.

2.4.1.1 Discuss outreach to CARE customers for the Home Energy Report, including percentage participation.

SoCalGas set a goal to reach 156,000 customers using the Home Energy Reports (HERs). The program targeted to reach low-income customers to: 1) educate them on their gas usage; 2) inform them of energy saving tips: and 3) when applicable, encourage

enrollment in the CARE Program. SoCalGas customers received two forms of marketing; 78,000 customers received Opower HERs outreach and received one paper form and 12 emails, and the other 78,000 customers received SoCalGas' developed HERs outreach and received four paper forms. Some attrition was observed due to customers opting out from receiving the reports, or moved and/or closed accounts. At the end of the outreach campaign, 4,586 customers had enrolled in CARE.

2.4.2 Discuss the most effective outreach method, including a discussion of how success is measured

SoCalGas employed the following marketing and outreach tactics during PY2018: CCC, direct mail, email, web based, third party outreach, bill inserts, and customer awareness efforts. Below is more detail on SoCalGas' largest sources of marketing based CARE enrollments.

Direct Mail: Through June of 2018, SoCalGas sent 974,416 direct mailers with paper applications to new customers, existing customers not on CARE and customers who are eligible to re-enroll in the program. In an effort to shift the focus to online enrollments, SoCalGas started only sending paper applications to new customers and directed all other customers receiving direct mail to apply online. After July, only 85,391 direct mailers with trackable paper applications were sent. Another 181,271 direct mailers directed customers to apply online, which are not trackable with a source code. For PY2018, SoCalGas processed 60,916

paper applications and approved 41,104 paper applications from direct mail.

SoCalGas' efforts to target and reach relatively large numbers of eligible customers not currently enrolled in the CARE Program are often accomplished through the direct mailing of CARE Program information which are all printed in English and Spanish and direct the customer to visit the website for immediate enrollment. These customers are selected based on an adjustable eligibility profile that shows them as living in high gap or high eligibility and low penetration areas. As of mid-2018, SoCalGas no longer included paper applications with direct mailers sent to existing SoCalGas customers not on CARE and customers who are eligible to re-enroll. SoCalGas online enrollments generated from direct mailers cannot be tracked since they do not contain a source code.

Web Based Outreach: In PY2018, SoCalGas received 41,893 applications through the internet and 40,065 were subsequently approved. Applications include enrollments, recertifications and opt-outs. All media communications directed customers to sign up for CARE through the website www.socalgas.com/care for English and www.socalgas.com/careparami for Spanish. Web based outreach consisted of program promotion through web links, e-mail blast campaigns, social media networks, and direct internet access.

Technology continues to play a large role in awareness and outreach. Social media sites such as Facebook and Twitter generate "click-throughs" and along with email-prompted web enrollment continue to be significant contributors to participation. SoCalGas tested messaging through its social media channels and email subject lines to improve channel effectiveness and drive awareness of the program as well as online enrollments. SoCalGas acknowledged this trend and launched SoCalGas' My Account applications and online web applications in the last quarter of 2017 generating over 132,774 applications submitted from launch through December 2018.

Third Party Door-to-Door Outreach: During PY2018 approximately 21,199 customers were enrolled by third party door-to-door outreach. Developed to perform outreach to SoCalGas' hardest-to-reach low-income customers, this proactive door-to-door enrollment tactic continues to be a key component of SoCalGas' marketing strategy. These outreach contractors produce high volume enrollments from a hands-on customer approach.

Bill Inserts: SoCalGas sent out over 3.6 million CARE self-mailer bill inserts during PY2018 with approximately 40,279 bill inserts and self-mailer applications returned, which resulted in approximately 2,960 customers newly enrolled into the CARE Program.

As discussed in section 2.4.1, SoCalGas sent out one residential bill insert in June of 2018 to all customers to notify them of the new income eligibility guidelines. This communication aimed to help customers that were close to meeting the guidelines last year but fell slightly short of the eligibility requirements. In addition, the insert helped increase awareness of the CARE Program among new and existing customers. In September of 2018, SoCalGas sent out a bill insert to 251,950 commercial customers. Going forward, residential bill inserts will only be mailed to residential customers not on CARE for optimal cost effectiveness.

Customer Awareness: Mass media and grassroots partnerships maintain and enhance the awareness of the CARE Program for SoCalGas. Many forms of outreach and advertising may go into the decision a customer makes when requesting a CARE application from SoCalGas, which reinforces SoCalGas' use of awareness channels, such as mass media and outreach with CBOs. Even with direct mail, the reinforcement provided by other awareness channels may play an important role. Thus, SoCalGas tracks individual channels where possible, but also views various methods as inter-connected and mutually reinforcing. Below are examples of awareness channels that SoCalGas employed in PY2018.

- **Capitation Program:** As described in Section 2.4.1, SoCalGas worked with different CBOs and outreach agencies to enroll eligible nonparticipating customers in the CARE Program during PY2018. CARE capitation contractors are located throughout the SoCalGas service area and employ various types of outreach strategies to enroll customers, such as local community event

participation, walk-in enrollment, and program material distribution.

- **Community-Based Organizations(CBO)/Faith-Based Organizations(FBO):** SoCalGas has been increasing its collaboration with CBOs and FBOs with hard-to-reach customer bases. These organizations are crucial parts of our relationship network to enhance awareness and trust among all customers, especially with hard-to-reach customers. The organizations that SoCalGas works with have a deep and ongoing relationship with their communities and are the trusted resource for their constituents. Often times customers come to these CBOs/FBOs for assistance with all matters relating to their home, family, and finances. For example, some CBOs that SoCalGas partners with help to do outreach in communities where trust issues may lie including Radio Campesina among farmworkers; Saint Barnabas Senior Services helping seniors in multiple languages throughout LA County; Mixteco Indigena Community Organizing Project/Proyecto Mixteco Indigena (MICOP) serving the Mixtec and indigenous immigrant community in Ventura County; Catholic Charities of Orange County promoting programs among CalFresh applicants in Orange County; and Fiesta Educativa working with parents of children with disabilities throughout Southern California.

2.4.3 Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

As indicated by the LINA study, barriers to program participation were identified for the hard-to-reach population and included barriers for renters, language and literacy barriers, barriers for rural/farm workers, accessibility barriers, undocumented residents, and process related barriers. SoCalGas used this information along with information from a study amongst CARE-eligible households who did not respond to participation invitations to craft messaging and outreach materials. All efforts with messaging that drove our customers to web enrollment, such as direct mail – which continues to be the most effective forms of enrollment – continued to be utilized. However, the challenge, as

identified in the LINA study of "literacy barriers" remains, and SoCalGas continues to fine-tune its targeting approach. Last year, SoCalGas started incorporating more infographics into collateral to explain program details and benefits. The concern with literacy and other barriers as listed above are used to target customers. SoCalGas has noted this and has addressed ways to send out simplified communication materials. Literacy challenges and general hardship may contribute to customers who fail to respond to a request to recertify their eligibility. Timely recertification is another ongoing challenge for SoCalGas. During PY2018, SoCalGas addressed this problem by sending reminder letters to customers and accompanying those letters with follow-up emails until July 2018. In PY2018, SoCalGas began brainstorming how to improve the effectiveness of several different "messages" and the timing of sending recertification emails. Letters continue to be modified as needed, favoring the incorporation of infographics as opposed to text heavy letters in efforts to address the literacy issue.

As strategic mitigation of literacy remains to be an issue, SoCalGas will continue to coordinate direct mail campaigns with door-to-door canvassing. The direct mail piece provides context for the canvassers, and the canvassers can bridge the cognitive gap for customers with literacy challenges.

SoCalGas is continuing to work increasingly with its partners in the community to make computers accessible to the customers they serve. The computers are used as an opportunity to guide customers through SoCalGas' programs and online enrollment process as opposed to taking materials home – that can get lost due to hectic everyday life – pending the return by mail or other enrollment efforts. Online sign ups played a key role in several outreach events and this approach is expected to continue and increase in the future. Partnerships with organizations like Southeast Development Corporation who have mobile computer labs, and Saint Barnabas Senior Services who have a Senior Tech Lab help to have this onsite enrollment for the customers they serve. For 2019, SoCalGas is looking at ways to partner with other organizations that have kiosks in high volume areas such as waiting rooms in clinics, community centers, and/or consulates where customers are already there to seek information and can have access to learn about and enroll in SoCalGas' Customer Assistance Programs. SoCalGas is also looking into investing in other outreach technologies such as mobile tablets that can be used at events to enroll customers on the spot.

2.4.4 Discuss how CARE customer data and other relevant program information is shared by the utility with other utilities sharing its service territory.

As in past practice, customers who do not participate in SoCalGas' CARE Program, but are enrolled in other utilities' (e.g., an electricity provider) CARE Program, are automatically eligible for SoCalGas' CARE Program. To make sure that eligible customers in overlapping territories receive all

discounts for which they are eligible, SoCalGas exchanges its CARE customer data with SCE and SDG&E. SoCalGas customers enrolled through data-sharing are mailed a letter notifying them of their enrollment, and are provided the opportunity to opt-out of SoCalGas' program if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in PY2001. In PY2018, SoCalGas enrolled 44,511 SCE CARE customers into the CARE Program, and updated last enrolled dates for 63,304 customers to retain them for another two years. Customers not enrolled were either already participating in SoCalGas' CARE Program or were not SoCalGas customers.

During PY2018, SoCalGas conducted a monthly data exchange with SDG&E. The exchanges resulted in 1,142 SDG&E CARE participants being added to SoCalGas' CARE Program.

Joint Utility Program Manager's Meeting:

In PY2018, SoCalGas, SCE, PG&E, SDG&E and Southwest Gas continued to meet periodically to discuss CARE outreach efforts and program operation issues, resolutions, and enhancements. The IOUs met

on April 5 at SDG&E offices in San Diego, July 13 at PG&E offices in San Francisco and November 2 at SCE offices in Rosemead.

2.4.5 Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

Leveraging with other assistance programs is one of the most cost-effective ways for SoCalGas to increase customer participation in the CARE Program. Therefore, customer information obtained from SoCalGas' ESA Program and GAF Program, along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes.

In PY2018, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who are receiving benefits from the ESA Program are automatically enrolled for the CARE discount and exempt from PEV if their eligibility has been verified by the ESA Program. In PY2018, SoCalGas enrolled 9,964 ESA Program customers in CARE.

SoCalGas' GAF Program provides a one-time bill assistance amount of up to $100 on a qualified customer's winter natural gas bill. The annual, one-time bill payment assistance is available to eligible customers on a first-come, first-served basis. The GAF program typically begins in February and continues through the end of May each year, or until funds are depleted.

Because the GAF Program has the same income eligibility guidelines as CARE, SoCalGas' GAF customer data and CARE customer data are interfaced. Customers participating in the GAF Program, but not in the CARE Program, are automatically enrolled in CARE. Additionally, because GAF customers provide proof of income when applying, customers approved for GAF are not subject to CARE's PEV process. Finally, CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their CARE eligibility again until the next two year recertification cycle has lapsed. This process helps reduce barriers to participation and assists in retaining qualified customers.

Through leveraging efforts with SoCalGas' GAF Program, SoCalGas enrolled 531 new participants in its CARE program during PY2018.

In PY2018, the GAF program provided approximately $231,624 in customer assistance. Funds for the program came from donations from customers, employees and shareholders.

PY2018	Shareholder Funded Distribution	Ratepayer Funded distribution	Total YTD
Beginning Balance	$44,547	$0[1]	$44,547
Customer & Shareholder Contributions	$249,757	$0	$249,757
Total Funds Available	$232,109	$0	$232,109
Administrative Fees [1]	$17,648	$0	$17,648
GAF Payments	$231,624	$0	$231,624
Remaining Balance	$485.45	$0	$485.45
Customers Assisted			2,827
Average Assistance			$82

[1] There were no Ratepayer Funds used in PY2018.

2.4.6 Describe the efforts taken to reach and coordinate the CARE program with other related low-income programs to reach eligible customers.

CARE Outreach collaborates with the ESA Program at community events. Outreach representatives are able to discuss multiple ways to save on energy bills such as the CARE discount, weatherization, and/or repairs for residences. In addition, SoCalGas often coordinates with SCE at these events. Even though located in separate booths, the two utilities are positioned close to each other and the customer is able to focus on "utility bill" assistance. Outreach workers are able to assist in directing customers to each booth. Outreach events that took place with these types of efforts included the Norwalk Community Connect Snowfest, Liberty Utilities Connect & Conserve Downey, and Lakewood Community Connect Backpack Giveaway.

Additionally, CARE Outreach also collaborates extensively with CalFresh program outreach. Efforts to reach and provide information on the CARE

Program to eligible customers, occur at events such as FBO workshops (e.g., Catholic Charities in Orange County) and with food banks (e.g., FIND Food bank which services Imperial and Riverside Counties).

2.4.6.1 Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making).

SoCalGas' CARE Program updated its My Account functionality allowing for CARE enrollment, CARE application processing, status updates, and facilitating secure CARE recertification and PEV. In addition, customers are able to view cost to date as well as historical usage information on My Account.

2.4.7 Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements).

In May 2000, CSD and SoCalGas entered into an agreement that solidified the coordination of resources and program benefits between CSD's LIHEAP and SoCalGas' CARE and GAF Programs. In June 2000, SoCalGas added the toll-free telephone numbers for LIHEAP (and the ESA Program) on the CARE applications. At the same time, SoCalGas

began providing CSD's toll free number to customers who call SoCalGas to request information on low-income assistance programs.

For PY2018, SoCalGas did not receive low-income customer information or requests for the CARE discount information from CSD. However, SoCalGas continued to receive LIHEAP payment information from CSD, which was used to apply LIHEAP payment assistance to a low-income customer's bill. For LIHEAP recipients, SoCalGas has an automated process in place that automatically PEV approves an account once a LIHEAP payment is posted to the account. Similarly, regarding GAF, once a GAF pledge is placed on an account, the customer is automatically PEV approved for CARE.

2.4.8 Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available

SoCalGas continued the operation of the CARE Program using cost-effective and efficient channels.

SoCalGas processed nearly 300,000 mailed applications (system generated, direct mail, bill inserts) in PY2018 via their content management systems. SoCalGas continues to electronically manage all customer-returned documents for ease of processing and retrieval on its network. This improves program delivery when customers call with

CARE inquiries and issues. The CARE processing staff can easily retrieve customer applications and manage issues accordingly.

SoCalGas continues to utilize best practices to maximize excellent customer service to support ease of enrollment, CARE approval, recertification, and PEV. Methods designed to increase enrollment and aid in the retention of CARE customers included CSR Enrollment, web enrollment, IVR enrollment, mail, fax or email an application, outbound dial reminder calls, leveraging with internal and external low-income programs, approval of CARE on accounts pending turn-on, and mailing of a 2nd recertification and PEV application.

The outbound reminder call alerts the customer that it is time to verify eligibility for CARE, or to renew enrollment, and to be aware that a request will arrive via mail within a few days. The 2nd recertification or PEV application is mailed to customers who fail to respond within 45 days to the initial request.

Immediate CARE approval on new accounts allows for preliminary CARE statuses (e.g., approved, incomplete, and denied) on accounts that are pending turn-on. As for leveraging, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes SDG&E and SCE CARE

participant information to enroll customers. Major changes to the CARE program in PY2018 include CSR CARE enrollments, My Account CARE implementation, SoCalGas CARE website enhancement, and CARE scanning operations upgrade.

Mail 2nd PEV Application: A second PEV application is mailed to customers who have not responded within 45 days to the initial request. Non-responsive customers are removed from the CARE Program. Customers who wish to become re-enrolled must submit proof of income or proof of participation in a specific assistance program when their termination date is less than 24 months from the current date. When 24 months from PEV termination have lapsed, customers can become re-enrolled on the program by simply completing a self-certification application.

CSR CARE Enrollment: To guarantee an even greater avenue for ease of enrollment, in its PY2015-2017 Application, SoCalGas requested CARE approval through CSRs when customers call the CCC to turn-on or back-on service, or to make payment extensions/arrangements. D.16-11-022 was issued November of 2016 and in January 2017, SoCalGas' CARE and IT departments began the planning, design, and creation of a CARE template adjacent to both the turn-on and payment extension templates, and used specifically by the CCC. Thorough testing and training of the

CSRs took place during the fourth quarter of 2017. CSR enrollment was implemented February 23, 2018. At year-end, the CCC successfully enrolled 140,672 customers in CARE.

Additionally, in its PY2015-2017 Application, SoCalGas proposed a one-time CARE CSR enrollment study, six months post implementation. The market research[29] was geared to determine whether any issues could be identified in order to make changes or enhancements to the process. CSR enrollment has been met with positive feedback.

Following are some points from the study:

- The vast majority of CSR enrolled customers found the process of enrolling in CARE to be easy. Fully, 95% said the process of enrolling and understanding the program requirements was "very easy" or "somewhat easy."
- CSR enrolled customers gave their CSR positive ratings for how they handled the call. Attributes such as "being courteous", "answering any questions", "caring about your issues", "talking in terms you can understand", and being clear about program requirements", all had a top 2 box rating of 93% or higher. Additionally, 96% said their enrolling representative provided sufficient information about the program.
- CSR enrolled customers are also highly satisfied with the CARE program, with 93% reporting that they are "very satisfied."

Mobile Home Park Utility Upgrade Program (MHP UUP): More than 200 mobile home parks have converted from master-metered or

[29] 2018 CARE Outreach Effectiveness and Customer Satisfaction Study, Travis Research

submetered to direct utility, impacting more than almost 12,000 tenants. For tenants on CARE and MBL, these programs have been seamlessly transferred to the tenants' new gas accounts for continued access to the benefits of each program. As the MHP UUP account executives hold meetings at the respective parks to provide an overview of the conversion, the account executives have continued to enroll additional tenants into CARE. An added benefit of the MHP UUP has been the conversion of master-metered accounts, where due to the meter configuration, tenants did not qualify for CARE. Once converted as SoCalGas customers, these tenants are now able to apply for CARE.

My Account: Since September of 2017, implemented per D.17-12-009, CARE Program enrollment, recertification and PEV web applications have been available within My Account in English and Spanish. CARE customers also have the option to opt-out of the program if they no longer qualify. Once customers log into My Account, their message center alerts them that they can apply to the CARE Program to see if they qualify, or that they are due for recertification or PEV, depending on their CARE status. Upon clicking the Apply Now link, the users are taken to a dedicated CARE Program page within My Account. The CARE page is also accessible from the My Account homepage's left column and Ways to Save dropdown menu. From the CARE page, the customer can see their current CARE status and may apply/recertify, submit verification or opt-out immediately. The enrollment, recertification and opt-out requests

are processed in real-time and users receive confirmation instantly upon completing the application. In addition to confirmation messages within the page, automated confirmation emails are also sent out. With the PEV application, customers can upload their required documents. Upon submission, users are notified within the page and via automated email that their application has been received and will be processed. PEV submissions are sent from the My Account database to the CARE Operations group for processing. Mobile versioning of the My Account CARE page was also made available.

This implementation has increased CARE enrollments, reduced manual processing of applications, and improved customer service by providing real-time status updates and application confirmation. Another benefit added is the opportunity to promote the ESA Program to CARE qualified customers who may also qualify for the ESA Program. Promotional images linked to the ESA Program page are included in the CARE enrollment approval confirmation message and emails.

In PY2018, SoCalGas approved a total of 88,275 applications received through My Account.

SoCalGas.com: In December of 2017, an enhancement to the SoCalGas CARE website was implemented in which online applications are

processed in real-time, instead of during the previous overnight batch process. Additionally, all five languages' "Apply Now" links navigate to a dedicated CARE page outside of My Account in the respective languages. From there, the customer can enter their account number and zip code, or look up their account number using their social security number. The customer will then be taken to the same My Account CARE page without having to log into My Account, and be able to enroll, recertify or opt-out of CARE. In order to submit PEV, the customer needs to log into My Account. Mobile versioning of the SoCalGas CARE website was also made available.

In PY2018, SoCalGas approved a total of 40,065 web applications. This enhancement has improved customer service and sped up enrollments by providing instant application confirmation.

2.5 Processing CARE Applications

2.5.1 Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

Recertification of sub-metered tenants of master-metered customers is the same process as that of regular residential customers. Recertification is required every two years, or every four years for customers on a fixed-income. The annual earnings of customers on a fixed-income do not fluctuate significantly from year to year, and requiring them to recertify every two years was an unnecessary burden. In PY2008, as authorized by

the CPUC in D.06-12-038,[30] SoCalGas implemented a four year recertification period for customers receiving Social Security, pension, Supplemental Security Income, Social Security Disability, State Supplemental Program, and/or Medi-Cal benefits.

Recertification applications are mailed directly to the sub-metered tenants when they are due to recertify. Each application is pre-populated with the tenant's name, facility identification number, unit number, and space or apartment number. Pre-population of applications was designed for tenants' simplified CARE renewal, ease of processing completed applications, and to aid in reducing attrition of CARE customers.

Several options for completing the recertification process are listed on the recertification application: call the toll-free Automated Voice Messaging number, mail application in the postage paid envelope, or directly fax to the CARE Program staff. Recertification requires the tenant to provide the number of household occupants, total annual household income, or participation in a public assistance program.

Applications received via U.S. mail are opened, scanned, and validated for processing efficiency. Tenants are allowed 90 days to respond to the recertification request, however, for tenants who have not responded to the

---

[30] *See* D.06-12-038.

recertification request within 45 days of the initial mailing, a second reminder is sent. Non-responsive tenants are removed from CARE. If the recertification is received and approved after the 90 day time-frame, the tenant is re-enrolled in CARE.

The monthly *Add & Delete* report is mailed to each sub-metered facility notifying the facility of any tenants who were recently added to CARE or removed from the program.

Prior to February 2018, a listing of CARE tenants was manually mailed to each park, on an annual basis. Although it is the responsibility of the owners/managers to maintain their own listing of CARE tenants, SoCalGas made the decision to aid in their recordkeeping and verify appropriate billing of the 20% discount for each CARE tenant by providing monthly listings rather than the customary annual report. In 2017, CARE and IT departments created, and tested for accuracy, automation of a monthly CARE listing, which was successfully executed February 2018. Prior to implementation, a notification letter was mailed to the mobile home parks informing them they will begin receiving a monthly listing of their CARE tenants, in addition to the monthly *Add & Delete* report, and both mailed concurrently with the customers' monthly bill.

Automatic monthly mailing of tenants on CARE has almost eliminated the daily phone calls from mobile home parks requesting a listing of CARE tenants.

2.5.2 Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

SoCalGas does not contract with third parties to conduct certification, recertification and/or verification on its behalf. SoCalGas processes and approves all CARE enrollment applications, recertification forms, and verification requests. Additionally, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes SDG&E and SCE CARE participant information to enroll customers.

In PY2018, SoCalGas contracted with 38 CBOs and two third party outreach contractors to help eligible non-participating customers sign up for the CARE Program. The non-profit CARE Capitation CBOs employed a "one-stop-shop" approach by helping their clients complete a CARE application, while also assisting the customers in enrolling in other programs they might be eligible for.

SoCalGas' third party CARE Outreach contractors employed a variety of outreach strategies, such as door-to-door solicitation, local community

event participation, and program material distribution to help customers apply for CARE. Many of the customers targeted by the third party CARE contractors do not respond to traditional forms of outreach, do not visit CBO facilities, and are much more receptive to door-to-door canvassing efforts. In PY2018, SoCalGas assigned specific counties to the third party outreach contractors so they could focus on their assigned SoCalGas territories and provide better customer service.

During PY2018, the number of customers enrolled in CARE by SoCalGas' CARE Capitation CBOs was 20 customers, and 21,199 new enrollments were derived from CARE's third party canvassers' efforts.

2.6 Program Management

2.6.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed

SoCalGas' CARE Program did not experience any serious issues or events that significantly affected program management during PY2018.

2.7 Pilots

2.7.1 Establishment of CHANGES Program

In D.15-12-047,[31] the Commission approved the establishment of CHANGES as an on-going statewide program, effective January 1, 2016. This was based on the success of the CHANGES pilot during its four year trial, and demonstrated to the CPUC the need for and usefulness of the

[31] D.15-12-047 (CHANGES Decision)

program. The ongoing CHANGES program will provide outreach, education, and natural gas bill issue assistance as well as services to LEP customers in the language of their choice through a statewide network of CBOs. CHANGES will be managed and reported by the CPUC's Consumer Service and Informtaion Division (CSID), with technical assistance and input from the Energy Division.

CHANGES is funded from CARE Program contributions by customers of the IOUs and provides services in those areas, not to exceed $1.75 million per fiscal year. Until a long term CPUC funding source can be established, the CHANGES Program will continue to be funded as a reimbursement from the CARE Program through the end of the current program cycle and may be renewed by the Commission as needed into the next CARE Program cycle. This is consistent with Public Utilities Code section 739.4, which allows expenditure of CARE funds to protect low-income and senior households from unwarranted disconnection of necessary electric and gas services.

In PY2018, meetings were scheduled by CSID, in collaboration with Energy Division, and held on a quarterly basis with all IOUs to discuss changes in the IOUs' program services, new consumer materials, marketing leveraging opportunities, and updates on statewide CHANGES program activities.

PG&E, SDG&E, SCE and SoCalGas received monthly data in PY2018 and included this data in monthly reports due on the 21st day of the following month. SoCalGas also included CHANGES bill issue assistance and education workshop materials and attendance statistics on a quarterly basis when available in their monthly CARE reports (Low Income Programs Monthly tables 10 and 11). The CHANGES group assistance sessions totaled 828 with 10,033 attendees.

2.8 Studies

In 2018 the Commission hired a third party to do a study of the CHANGES program to assess the cost effectiveness of the CHANGES services being delivered to consumers. The CHANGES Evaluation Report was issued December 24, 2018.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

3.1.1 Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

See CARE Table 12 in the attachments.

3.1.2 State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

There were 23,347 residents in the non-residential CARE Expansion Program facilities, comprised of 552 primary facilities with 643 associated satellite facilities participating in the CARE Expansion Program at PY2018 year-end.

3.2 Usage Information

3.2.1 Provide the average monthly usage by energy source per residential facility and per commercial facility.

See CARE Table 12 in the attachments.

3.3 Program Costs

3.3.1 Administrative Cost (Show the CARE Expansion Program's administrative cost by category).

For PY2018, SoCalGas incurred $2,874 in outreach expenses for the CARE Expansion Program bill insert to 251,950 commercial customers. Because of the small number of participants, SoCalGas did not track administrative labor costs for new CARE Expansion applications received during PY2018.

3.3.2 Discount Information.

3.3.2.1 State the average annual CARE discount received per residential facility by energy source.

The average annual discount received per participating CARE residential facility in PY2018 was $68.05.[32]

3.3.2.2 State the average annual CARE discount received per commercial facility by energy source.

The average annual discount received per participating CARE Expansion Program facility in PY2018 was $333.90.[33]

---

[32] Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.
[33] Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

3.4 Outreach

3.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

Annually, SoCalGas sends a bill insert to commercial customers informing them of the Non-Profit Group Living Rate. In addition, SoCalGas worked with Public Affairs personnel in rural counties to promote program awareness for low-income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Radio Campesina in Visalia and Bakersfield to reach farm workers. During PY2018, Radio Campesina provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Food, musical entertainment, and information from SoCalGas regarding the CARE Program are part of these lunch break sessions. In PY2018, SoCalGas also advertised the CARE Program with 30-second, Spanish language radio spots and participated in community events and local school events. SoCalGas also partnered with the station for holiday giveaways to families in the surrounding areas that receive all items needed for a holiday meal.

3.4.2 Discuss each of the following: The Expansion Program outreach

SoCalGas used a variety of channels to increase awareness of the CARE Program in PY2018. Among those channels were agricultural workers and those living in commercial facilities. During September of 2018, SoCalGas mailed approximately 251,950 bill inserts to commercial facilities (non-profit group living facilities and migrant worker housing).

In past years, SoCalGas also leveraged the relationships of its Public Affairs personnel in developing grassroots relationships with organizations such as Radio Campesina and Mixteco that work closely with agricultural and migrant workers in order to continue to educate members about SoCalGas' Customer Assistance Programs.

3.4.2.1 Discuss the most effective outreach method, including a discussion of how success is measured.

In PY2018, the CCC continued to be an effective outreach method for SoCalGas' CARE Expansion Program. In this model, customers who call to establish gas service, or make payment arrangements, speak with CSRs who present CARE Program information to them and respond to questions. Social service networks also continue to be another valuable communication medium to promote CARE Program information to CARE expansion customers.

3.4.2.2 Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

There was no facility data sharing during PY2018.

3.4.2.3 Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

SoCalGas is not aware of barriers to participation in PY2018. A knowledgeable, full-time SoCalGas employee, dedicated solely to the Expansion Program, processes applications as they are received. Incomplete applications are followed-up with a phone

call or correspondence to the customer, resulting in CARE approval of qualified accounts.

3.4.3 Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

Every two years, the facilities are required to recertify eligibility. Correspondence containing a recertification application, postage-paid envelope, and an instruction letter is mailed to the facilities. Among other directions, the letter states that the facility must include a short statement specifying how the CARE Program savings were used for the benefit of the residents at the facility. The application is easy to understand and the majority of applicants include the necessary qualifying documentation, with no further follow-up needed. The facilities are familiar with this routine and submit what is requested. Applications are processed in a timely manner when they are received.

Although SoCalGas considers the current processing of CARE Expansion Program applications to be cost-effective, SoCalGas believes that a four-year recertification period would be more prudent in terms of reduced processing time, cost-savings in reduced paper and postage, and increased customer satisfaction.

Additionally, the CCC and Billing Department notify the CARE Department of new Expansion Program accounts, for both non-profit and agricultural group living facilities. A CARE application is proactively mailed to these accounts.

3.5 Program Management

3.5.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

SoCalGas' CARE Program did not experience any issues or events that significantly affected program management during PY2018.

4. FUND SHIFTING

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-02 and D. 17-12-009.

See ESA Table 12.

4.1.1 Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-022 and D. 17-12-009.

See CARE Table 1.

4.1.2 Was there any Energy Savings Assistance Programs or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-022 and D. 17-12-009.

All fund shifting activity performed in PY2018 is in compliance with fund shifting rules as laid out in D.12-08-044, D.16-11-022 and D.17-12-009.

5. COMMONLY USED ACRONYMS

AB	Assembly Bill
AL	Advice Letter
CAM	Common Area Measure
CARE	California Alternate Rates for Energy
CBO	Community Based Organization
CCC	Customer Contact Center
CE	Categorical Eligibility
CHANGES	Community Help and Awareness with Natural Gas and Electricity Services Pilot Program
CPUC	California Public Utilities Commission
CSD	California Department of Community Services and Development
CSID	Consumer Service and Information Division
CSR	Customer Service Representative
D.	Decision
DPSS	LA County Department of Public Social Services
E&A	Enrollment & Assessment
ED	Energy Division
ERC	Energy Resource Center
EE	Energy Efficiency
ESA	Energy Savings Assistance Program
FAU	Forced Air Unit
FBO	Faith Based Organization
FPG	Federal Poverty Guideline
FPL	Federal Poverty Level
GAF	Gas Assistance Fund
HE	High Efficiency
HEAT	Home Energy Assistance Tracking
HER	Home Energy Report
HVAC	Heating, Ventilation, Air Conditioning
IDSM	Integrated Demand Side Management
IOU	Investor Owned Utility
IT	Information Technology
IVR	Integrated Voice Recognition
LADWP	Los Angeles Department of Water and Power

LEP	Limited English Proficient
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIWP	Low Income Weatherization Program
MBL	Medical Baseline
MCWG	Mid-Cycle Working Group
MF	Multifamily
MFWG	Multifamily Working Group
M&O	Marketing & Outreach
NEB	Non-energy Benefit
NDA	Non-disclosure Agreement
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PEV	Post Enrollment Verification
PG&E	Pacific Gas and Electric Company
PY	Program Year
RFP	Request for Proposals
SB	Senate Bill
SCE	Southern California Edison Company
SD&GE	San Diego Gas & Electric Company
SEC	Service Establishment Charge
SoCalGas	Southern California Gas Company
SPOC	Single Point of Contact
WNA	Whole Neighborhood Approach

6. APPENDIX A: COLLATERAL MATERIALS

6.1 ESA Program Tables

ESA Program- Table 1 - Overall Program Expenses

ESA Program – Table 1A – 2009-2016 Unspent Program Funds

ESA Program- Table 2 - Expenses & Energy Savings by Measures Installed Summary

ESA Program – Table 2A – Expenses & Energy Savings by Measures Installed – CSD Leveraging

ESA Program – Table 2B – Expenses & Energy Savings by Measures Installed - Multifamily Common Area

ESA Program- Table 3 - Cost Effectiveness

ESA Program- Table 4 - Detail by Housing Type and Source

ESA Program- Table 5 - Direct Purchases & Installation Contractors

ESA Program- Table 6 - Installation Cost of Program Installation Contractors

ESA Program- Table 7 - Expenditures Recorded by Cost Elements

ESA Program- Table 8 - Homes Unwilling/Unable to Participate

ESA Program- Table 9 - Life Cycle Bill Savings by Measure

ESA Program- Table 10 - Energy Rate Used for Bill Savings Calculations

ESA Program- Table 11 - Bill Savings Calculations by Program Year

ESA Program- Table 12 - Fund Shifting

ESA Program- Table 13 - Categorical and Other Enrollment

ESA Program- Table 14 - Leveraging & Integration

ESA Program- Table 15 - Lighting

ESA Program- Table 16 - ”Add back” measures

ESA Program – Table 17 -Expenditures for Pilots and Studies

ESA Program – Table 18 – Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)

6.2 CARE Tables

CARE Table 1 - Overall Program Expenses

CARE Table 2 - Enrollment, Recertification, Attrition, and Penetration

CARE Table 3 - Verification

CARE Table 4 - Self Certification and Re-Certification

CARE Table 5 - Enrollment by County

CARE Table 6 - Recertification Results

CARE Table 7 - Capitation Contractors

CARE Table 8 - Participants as of Month End

CARE Table 9 - Average Monthly Usage & Bill

CARE Table 10 - Surcharge & Revenue

CARE Table 11 - Capitation Applications

CARE Table 12 - Expansion Program

CARE Table 13 - High Usage Verification Results

CARE Table 13A – Customer Usage and ESA Program Treatment

CARE Table 14 – Categorical Enrollment

Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
SOUTHERN CALIFORNIA GAS COMPANY
PY 2018 Summary Highlights

ESA Program

2018 Energy Savings Assistance Program Summary			
2018	**Authorized / Planning Assumptions**	**Actual**	**%**
Budget [1]	$129,251,729	$93,149,896	72%
Funded from 2009-2016 Unspent Funds [2]	$69,553,858	$1,342,656	2%
Summary Homes Treated	169,910	99,457	59%
Summary kWh Saved	N/A	N/A	N/A
Summary kW Demand Reduced	N/A	N/A	N/A
Summary Therms Saved	6,210,000	1,575,510	25%
First Touches Homes Treated	116,592	40,998	35%
- kWh Saved	N/A	N/A	N/A
- kW Demand Reduced	N/A	N/A	N/A
- Therms Saved	4,260,060	637,858	15%
Go-Backs/Retreated Homes	53,318	58,459	110%
- kWh Saved	N/A	N/A	N/A
- kW Demand Reduced	N/A	N/A	N/A
- Therms Saved	1,949,940	1,015,577	52%

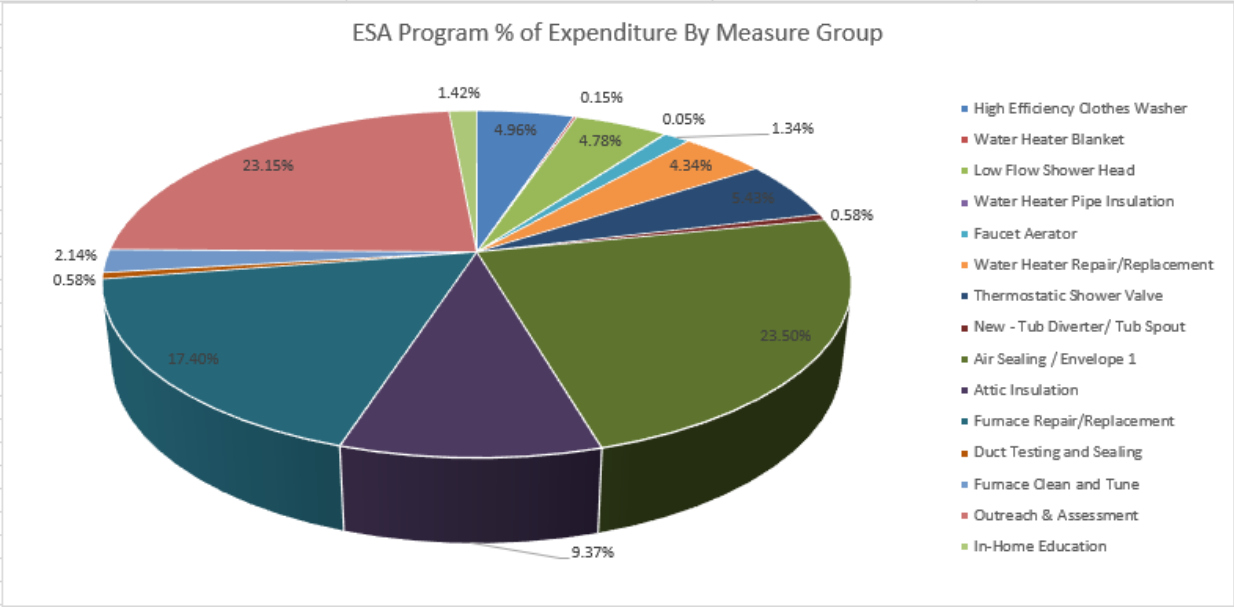
[1] Budget reflects the authorized funding in D.16-11-022. Additional funds allocated from prior-cycle unspent budgets as ordered in G-3532 dated 'December 14, 2017, Non-Standard Disposition of Clear Plan AL 5256, dated May 18, 2018, and Non-Standard Disposition of Mid-Cycle AL 5325, dated December 19, 2018.

[2] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds and this table does not include 'unspent funds from the 2017-2020 cycle.

CARE Program

2018 CARE Program Summary			
2018	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 10,091,122	$ 7,910,991	78%
Subsidies	$ 128,608,105	$ 108,348,466	84%
Service Establishment Charge	$ 3,743,874	$ 3,285,834	88%
Total Program Costs and Discounts	**$ 142,443,101**	**$ 119,545,291**	84%
2018 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Categorically Eligible**	**Self Certified as Income Eligible**
Method	76,228	125,077	110,606
2018 CARE Penetration	**Estimated Eligible Participants**	**Participants**	**Penetration Rate**
Total Enrolled	1,793,870	1,615,527	90%

Note: Reflects the authorized funding per year in D.16-11-022 and updated via Resolution G-3532 addressing conforming Advice Letters 5111-A and 5111-B



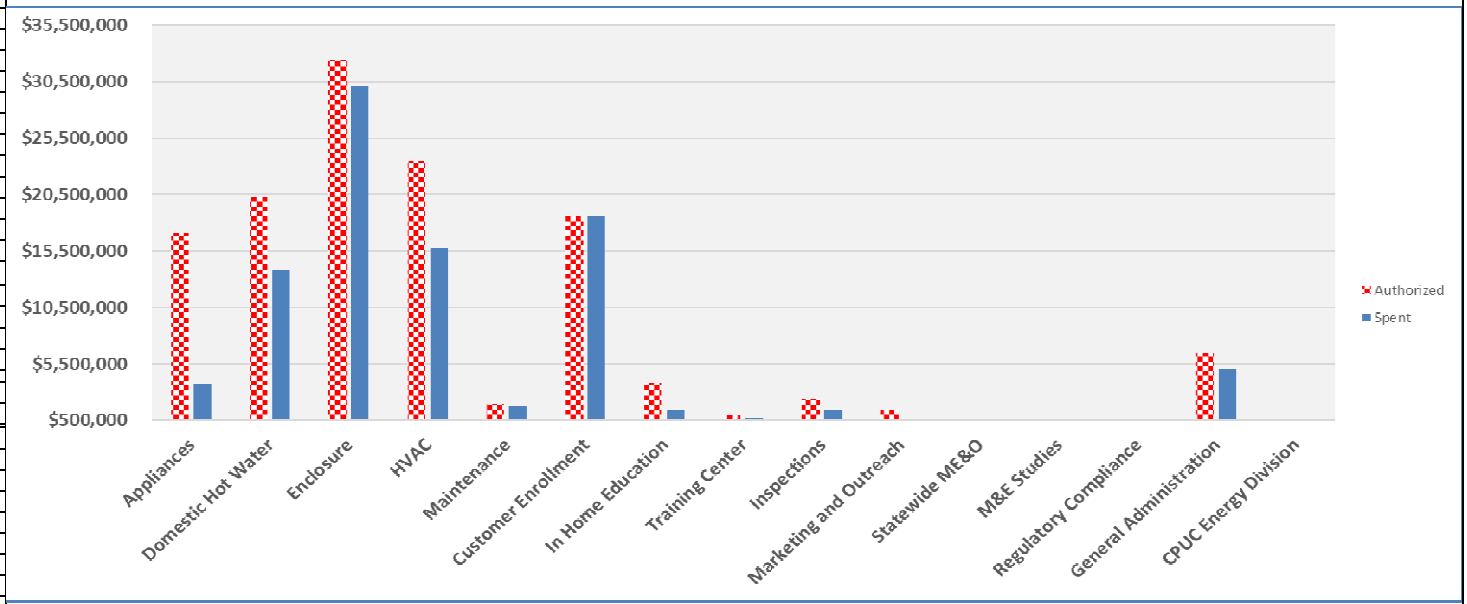
PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 1
ESA Program Overall Program Expenses
SOUTHERN CALIFORNIA GAS COMPANY

	2018 Authorized Budget [1]			2018 Annual Expenses			% of Budget Spent		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency									
Appliances	N/A	$ 17,117,000	$ 17,117,000	N/A	$ 3,735,217	$ 3,735,217	N/A	22%	22%
Domestic Hot Water	N/A	$ 20,236,546	$ 20,236,546	N/A	$ 13,868,894	$ 13,868,894	N/A	69%	69%
Enclosure	N/A	$ 32,374,249	$ 32,374,249	N/A	$ 30,152,972	$ 30,152,972	N/A	93%	93%
HVAC	N/A	$ 23,488,373	$ 23,488,373	N/A	$ 15,698,772	$ 15,698,772	N/A	67%	67%
Maintenance	N/A	$ 1,937,734	$ 1,937,734	N/A	$ 1,781,776	$ 1,781,776	N/A	92%	92%
Lighting	N/A	$ -	$ -	N/A	$ -	$ -	N/A	0%	0%
Miscellaneous	N/A	$ -	$ -	N/A	$ -	$ -	N/A	0%	0%
Customer Enrollment	N/A	$ 18,515,920	$ 18,515,920	N/A	$ 18,515,920	$ 18,515,920	N/A	100%	100%
In Home Education	N/A	$ 3,798,033	$ 3,798,033	N/A	$ 1,383,182	$ 1,383,182	N/A	36%	36%
Pilot	N/A	$ -	$ -	N/A	$ -	$ -	N/A	0%	0%
Energy Efficiency TOTAL	N/A	**$ 117,467,855**	**$ 117,467,855**	N/A	**$ 85,136,732**	**$ 85,136,732**	N/A	**72%**	**72%**
Training Center	N/A	$ 908,314	$ 908,314	N/A	$ 732,315	$ 732,315	N/A	81%	81%
Inspections	N/A	$ 2,341,714	$ 2,341,714	N/A	$ 1,432,968	$ 1,432,968	N/A	61%	61%
Marketing and Outreach	N/A	$ 1,450,000	$ 1,450,000	N/A	$ 380,595	$ 380,595	N/A	26%	26%
Statewide Marketing Education and Outreach	N/A	$ -	$ -	N/A	$ -	$ -	N/A	0%	0%
Measurement and Evaluation Studies	N/A	$ 153,125	$ 153,125	N/A	$ 100,437	$ 100,437	N/A	66%	66%
Regulatory Compliance	N/A	$ 344,307	$ 344,307	N/A	$ 344,307	$ 344,307	N/A	100%	100%
General Administration	N/A	$ 6,500,414	$ 6,500,414	N/A	$ 4,998,134	$ 4,998,134	N/A	77%	77%
CPUC Energy Division	N/A	$ 86,000	$ 86,000	N/A	$ 24,410	$ 24,410	N/A	28%	28%
TOTAL PROGRAM COSTS [2]	N/A	**$ 129,251,729**	**$ 129,251,729**	N/A	**$ 93,149,896**	**$ 93,149,896**	N/A	**72%**	**72%**
Funded Outside of ESA Program Budget									
Indirect Costs				$ -	$ 3,675,330	$ 3,675,330			
NGAT Costs				$ -	$ 2,175,738	$ 2,175,738			

[1] Reflects the authorized funding in D.16-11-022. Additional funds allocated from prior-cycle unspent budgets as ordered in G-3532 dated December 14, 2017, Non-Standard Disposition of Clear Plan AL 5256, dated May 18, 2018, and Non-Standard Disposition of Mid-Cycle AL 5325, dated December 19, 2018 are not shown on this table but appear on Table 1A.

[2] Additional 2018 spend in the amount of $1,352,156 not included here in Table 1 because it is being funded out of prior cycle unspent funds. (See Table 1A) Total 2018 spend is actually $94,492,552 or ($93,149,896 + $1,342,656).

Bar Chart 1 - Total Spent vs. Authorized by Category



PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 1A

Expenses Funded from 2009-2016 Unspent Program Funds **SOUTHERN**

CALIFORNIA GAS COMPANY

	2017-2020 Authorized Budget [1]			2018 Annual Expenses			% of Budget Spent		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency									
Appliances	N/A	$ 2,437,664	$ 2,437,664	N/A	$ -	$ -	N/A	0.00%	0.00%
Domestic Hot Water	N/A	$ 10,206,368	$ 10,206,368	N/A	$ -	$ -	N/A	0.00%	0.00%
Enclosure	N/A	$ 16,572,726	$ 16,572,726	N/A	$ -	$ -	N/A	0.00%	0.00%
HVAC	N/A	$ 11,609,790	$ 11,609,790	N/A	$ -	$ -	N/A	0.00%	0.00%
Maintenance	N/A	$ 1,152,857	$ 1,152,857	N/A	$ -	$ -	N/A	0.00%	0.00%
Customer Enrollment	N/A	$ 15,830,640	$ 15,830,640	N/A	$ 1,066,848	$ 1,066,848	N/A	6.74%	6.74%
In Home Education	N/A	$ 4,242,095	$ 4,242,095	N/A	$ -	$ -	N/A	0.00%	0.00%
Pilot	N/A	$ 500,000	$ 500,000	N/A	$ -	$ -	N/A	0.00%	0.00%
Training Center	N/A	$ 18,367	$ 18,367	N/A	$ -	$ -	N/A	0.00%	0.00%
Inspections	N/A	$ 1,111,508	$ 1,111,508	N/A	$ -	$ -	N/A	0.00%	0.00%
Marketing and Outreach	N/A	$ 750,000	$ 750,000	N/A	$ -	$ -	N/A	0.00%	0.00%
Mult-Family	N/A	$ 4,500,000	$ 4,500,000	N/A	$ 223,581	$ 223,581	N/A	4.97%	4.97%
Leveraging - CSD	N/A	$ 261,036	$ 261,036	N/A	$ -	$ -	N/A	0.00%	0.00%
Regulatory Compliance	N/A	$ 60,807	$ 60,807	N/A	$ 52,227	$ 52,227	N/A	85.89%	85.89%
General Administration	N/A	$ 300,000	$ 300,000	N/A	$ -	$ -	N/A	0.00%	0.00%
TOTAL UNSPENT PROGRAM COSTS [1]	N/A	**$ 69,553,858**	**$ 69,553,858**	N/A	**$ 1,342,656**	**$ 1,342,656**	**N/A**	**1.93%**	**1.93%**

[1] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds and this table does not include unspent funds from the 2017-2020 cycle.

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 2
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

	ESA Program (Summary)Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE)[6]						
		Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation					
Measures	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditure**	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditure**	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditure**	**Units**	**Quantity Installed**	**kWh [4] (Annual)**	**kW [4] (Annual)**	**Therms [4] (Annual)**	**Expenses ($)**	**% of Expenditure**
Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																						
High Efficiency Clothes Washer	Each	5,076	-	-	156,747	$ 4,128,076	5.0%	Each	1,888	-	-	58,301	$ 1,531,639	4.7%	Each	3,188	-	-	98,445	$ 2,596,436	5.1%	Each	2,041	-	-	63,026	$ 1,666,226	4.3%
Refrigerators	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Microwaves [5]	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water																												
Water Heater Blanket	Home	2,247	-	-	5,393	$ 128,883	0.2%	Home	1,168	-	-	2,779	$ 66,998	0.2%	Home	1,079	-	-	2,614	$ 61,886	0.1%	Home	678	-	-	1,673	$ 38,965	0.1%
Low Flow Shower Head	Home	87,351	-	-	128,472	$ 3,975,023	4.8%	Home	35,308	-	-	49,816	$ 1,631,159	5.0%	Home	52,043	-	-	78,656	$ 2,343,863	4.6%	Home	43,931	-	-	60,758	$ 1,798,012	4.7%
Water Heater Pipe Insulation	Home	1,716	-	-	3,059	$ 38,027	0.0%	Home	667	-	-	1,184	$ 14,773	0.0%	Home	1,049	-	-	1,875	$ 23,254	0.0%	Home	781	-	-	1,407	$ 17,326	0.0%
Faucet Aerator	Home	79,622	-	-	265,731	$ 1,116,370	1.3%	Home	31,846	-	-	100,591	$ 454,430	1.4%	Home	47,776	-	-	165,140	$ 661,940	1.3%	Home	40,177	-	-	123,632	$ 535,996	1.4%
Water Heater Repair/Replacement	Each	1,985	-	-	6,885	$ 3,614,946	4.3%	Each	623	-	-	2,137	$ 1,125,526	3.4%	Each	1,362	-	-	4,748	$ 2,489,420	4.9%	Each	541	-	-	1,820	$ 974,130	2.5%
Thermostatic Shower Valve	Each	101,601	-	-	245,006	$ 4,519,900	5.4%	Each	40,325	-	-	93,436	$ 1,793,244	5.5%	Each	61,276	-	-	151,570	$ 2,726,656	5.4%	Each	47,171	-	-	105,559	$ 2,098,240	5.4%
New - Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	0	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	0	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	4,478	-	-	35,857	$ 481,878	0.6%	Each	1,761	-	-	14,273	$ 191,090	0.6%	Each	2,717	-	-	21,585	$ 290,789	0.6%	Each	1,107	-	-	9,150	$ 119,307	0.3%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Enclosure																												
Air Sealing / Envelope [1]	Home	78,657	-	-	353,885	$ 19,554,717	23.5%	Home	29,388	-	-	119,149	$ 7,042,662	21.5%	Home	49,269	-	-	234,736	$ 12,512,055	24.8%	Home	36,927	-	-	32,452	$ 9,047,123	23.5%
Caulking	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
Attic Insulation	Home	5,657	-	-	150,823	$ 7,798,100	9.4%	Home	2,593	-	-	69,780	$ 3,673,654	11.2%	Home	3,064	-	-	81,043	$ 4,124,446	8.2%	Home	3,657	-	-	101,800	$ 4,676,373	12.1%
HVAC																												
FAU Standing Pilot Conversion	Each	2	-	-	84	$ 1,076	0.0%	Each	1	-	-	42	$ 347	0.0%	Each	1	-	-	42	$ 729	0.0%	Each	1	-	-	42	$ 311	0.0%
Furnace Repair/Replacement	Each	8,674	-	-	-	$ 14,479,640	17.4%	Each	2,378	-	-	-	$ 4,371,585	13.4%	Each	6,296	-	-	-	$ 10,108,055	20.0%	Each	4,001	-	-	-	$ 6,832,754	17.7%
Room A/C Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Duct Testing and Sealing	Home	867	-	-	13,292	$ 481,824	0.6%	Home	270	-	-	4,086	$ 169,914	0.5%	Home	597	-	-	9,206	$ 311,910	0.6%	Home	228	-	-	3,470	$ 117,407	0.3%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	6,476	-	-	18,557	$ 671,594	0.8%	Home	2,992			8,447	$ 317,030	1.0%	Home	3,484	-	-	10,110	$ 354,564	0.7%	Home	1,541	-	-	4,314	$ 158,313	0.4%
New - High Efficiency Forced Air Unit (HE FAU	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
Maintenance																												
Furnace Clean and Tune	Home	31,740	-	-	191,718	$ 1,778,952	2.1%	Home	12,620	-	-	78,373	$ 724,129	2.2%	Home	19,120	-	-	113,345	$ 1,054,822	2.1%	Home	13,879	-	-	100,728	$ 734,098	1.9%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%
Lighting																												
Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Torchiere	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
LED Night Lights	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Pilots																												
																					0.0%							
Customer Enrollment																												
Outreach & Assessment	Home	112,916				$ 19,260,039	23.1%	Home	48,209				$ 9,162,399	28.0%	Home	64,707				$ 10,097,640	20.0%	Home	55,219				$ 9,634,037	25.0%
In-Home Education	Home	78,888				$ 1,183,095	1.4%	Home	31,325				$ 469,545	1.4%	Home	47,563				$ 713,550	1.4%	Home	42,067				$ 131,850	0.3%
Total Savings/Expenditures			-	-	1,575,510	$ 83,212,138				-	-	602,394	$ 32,740,122				-	-	973,115	$ 50,472,016				-	-	609,832	$ 38,580,466	
Total Households Weatherized [2]		99,242							40,890							58,352							49,196					

Households Treated	Total (K+S)		**First Touches**		**Re-treated Homes/Go-Backs**		**Aliso Canyon**	
- Single Family Households Treated	Home	67,741	Home	25,002	Home	42,739	Home	28,908
- Multi-family Households Treated	Home	24,770	Home	13,332	Home	11,438	Home	19,308
- Mobile Homes Treated	Home	6,946	Home	2,664	Home	4,282	Home	1,097
Total Number of Households Treated	Home	99,457	Home	40,998	Home	58,459	Home	49,313
# Eligible Households to be Treated for PY [3]	Home	169,910	Home	116,592	Home	53,318	Home	N/A
% of Households Treated	%	59%	%	35%	%	110%	%	0%
- Master-Meter Households Treated	Home	11,819	Home	7,245	Home	4,574	Home	7,451

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking anc
minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs
[3] Based on Disposition of Advice Letter 5325.
[4] All savings are calculated based on the following sources:
Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013
[5] Microwave savings are from ECONorthWest Studies received in December of 2011
[6] Data for Aliso Canyon includes "First Touches and Re-Treatments".

	A	B	C	D	E	F	G	H
1	**PY 2018 Energy Savings Assistance Program Annual Report**							
2	**ESA Program Table 2A**							
3	**ESA Program Expenses and Energy Savings by Measures Installed**							
4	**SOUTHERN CALIFORNIA GAS COMPANY**							
5								
6		**ESA Program - CSD Leveraging**						
7			**Year-To-Date Completed & Expensed Installation**					
8	**Measures**	**Units**	**Quantity Installed**	**kWh [3] (Annual)**	**kW [3] (Annual)**	**Therms [3] (Annual)**	**Expenses ($)**	**% of Expenditure**
9	**Appliances**							
10	High Efficiency Clothes Washer	Each						0.0%
11	Refrigerators	Each						0.0%
12	Microwaves [4]	Each						0.0%
13	**Domestic Hot Water**							
14	Water Heater Blanket	Home						0.0%
15	Low Flow Shower Head	Home						0.0%
16	Water Heater Pipe Insulation	Home						0.0%
17	Faucet Aerator	Home						0.0%
18	Water Heater Repair/Replacement	Each						0.0%
19	Thermostatic Shower Valve	Each						0.0%
20	New - Combined Showerhead/TSV	Each						0.0%
21	New - Heat Pump Water Heater	Each						0.0%
22	New - Tub Diverter/ Tub Spout	Each						0.0%
23	New - Thermostat-controlled Shower Valve	Each						0.0%
24	**Enclosure**							
25	Air Sealing / Envelope [1]	Home						0.0%
26	Caulking	Home						0.0%
27	Attic Insulation	Home						0.0%
28	**HVAC**							
29	FAU Standing Pilot Conversion	Each						0.0%
30	Furnace Repair/Replacement	Each						0.0%
31	Room A/C Replacement	Each						0.0%
32	Central A/C replacement	Each						0.0%
33	Heat Pump Replacement	Each						0.0%
34	Evaporative Cooler (Replacement)	Each						0.0%
35	Evaporative Cooler (Installation)	Each						0.0%
36	Duct Testing and Sealing	Home						0.0%
37	New - Energy Efficient Fan Control	Home						0.0%
38	New - Prescriptive Duct Sealing	Home						0.0%
39	New - High Efficiency Forced Air Unit (HE FAU)	Home						0.0%
40	New - A/C Time Delay	Home						0.0%
41	**Maintenance**							
42	Furnace Clean and Tune	Home						0.0%
43	Central A/C Tune up	Home						0.0%
44	**Lighting**							
45	Compact Fluorescent Lights (CFL)	Each						0.0%
46	Interior Hard wired CFL fixtures	Each						0.0%
47	Exterior Hard wired CFL fixtures	Each						0.0%
48	Torchiere	Each						0.0%
49	Occupancy Sensor	Each						0.0%
50	LED Night Lights	Each						0.0%
51	New - LED Diffuse Bulb (60W Replacement)	Each						0.0%
52	New - LED Reflector Bulb	Each						0.0%
53	New - LED Reflector Downlight Retrofit Kits	Each						0.0%
54	New - LED A-Lamps	Each						0.0%
55	**Miscellaneous**							
56	Pool Pumps	Each						0.0%
57	Smart Power Strips - Tier 1	Each						0.0%
58	New - Smart Power Strips - Tier 2	Each						0.0%
59	**Pilots**							
60								
61	**Customer Enrollment**							
62	Outreach & Assessment	Home					$ -	0.0%
63	In-Home Education	Home					$ -	0.0%
64								
65	**Total Savings/Expenditures**			-	-	-	$ -	0.0%
66								
67	Total Households Weatherized [2]							
68								
69	**CSD MF Buildings Treated**			**Total**				
70								
71	- Multi-family							
72								
73								
74	[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.							
75	[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.							
76	[3] All savings are calculated based on the following sources:							
77	Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013							
78	[4] Microwave savings are from ECONorthWest Studies received in December of 2011.							

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 2B
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

		ESA Program - Multifamily Common Area[1]					
		Year-To-Date Completed & Expensed Installation					
Measures	**Units**	**Quantity Installed**	**kWh [2] (Annual)**	**kW [2] (Annual)**	**Therms [2] (Annual)**	**Expenses ($) [8]**	**% of Expenditure**
Appliances							
High Efficiency Clothes Washer	Each						0.0%
Refrigerators	Each						0.0%
Microwaves [3]	Each						0.0%
Domestic Hot Water							
Water Heater Blanket	Home						0.0%
Low Flow Shower Head	Home						0.0%
Water Heater Pipe Insulation	Home						0.0%
Faucet Aerator	Home						0.0%
Water Heater Repair/Replacement	Each						0.0%
Thermostatic Shower Valve	Each						0.0%
New - Combined Showerhead/TSV	Each						0.0%
New - Heat Pump Water Heater	Each						0.0%
New - Tub Diverter/ Tub Spout	Each						0.0%
New - Thermostat-controlled Shower Valve	Each						0.0%
Enclosure							
Air Sealing / Envelope [4]	Home						0.0%
Caulking	Home						0.0%
Attic Insulation	Home						0.0%
HVAC							
FAU Standing Pilot Conversion	Each						0.0%
Furnace Repair/Replacement	Each						0.0%
Room A/C Replacement	Each						0.0%
Central A/C replacement	Each						0.0%
Heat Pump Replacement	Each						0.0%
Evaporative Cooler (Replacement)	Each						0.0%
Evaporative Cooler (Installation)	Each						0.0%
Duct Testing and Sealing	Home						0.0%
New - Energy Efficient Fan Control	Home						0.0%
New - Prescriptive Duct Sealing	Home						0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home						0.0%
New - A/C Time Delay	Home						0.0%
Maintenance							
Furnace Clean and Tune	Home						0.0%
Central A/C Tune up	Home						0.0%
Lighting							
Compact Fluorescent Lights (CFL)	Each						0.0%
Interior Hard wired CFL fixtures	Each						0.0%
Exterior Hard wired CFL fixtures	Each						0.0%
Torchiere	Each						0.0%
Occupancy Sensor	Each						0.0%
LED Night Lights	Each						0.0%
New - LED Diffuse Bulb (60W Replacement)	Each						0.0%
New - LED Reflector Bulb	Each						0.0%
New - LED Reflector Downlight Retrofit Kits	Each						0.0%
New - LED A-Lamps	Each						0.0%
Miscellaneous							
Pool Pumps	Each						0.0%
Smart Power Strips - Tier 1	Each						0.0%
New - Smart Power Strips - Tier 2	Each						0.0%
Ancillary Services							
Commissioning [5]	Home						0.0%
Audit	Home						0.0%
Administration [6]	Home					$ 2,938	12.2%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home					$ 21,114	87.8%
In-Home Education	Home						0.0%
Total Savings/Expenditures			-	-	-	$ 24,052	100.0%
Total Multifamily Buildings Weatherized [7]							
Multifamily Buildings Treated	**Total**						
- Multifamily							

[1] Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 200% of the Federal Poverty Guidelines.

[2] All savings are calculated based on the following sources:
Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013

[3] Microwave savings are from ECONorthWest Studies received in December of 2011

[4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

[6] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.

[7] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

[8] Costs related to direct implementation (DI) in the amount of $199,529 are currently excluded from this table due to the fact that no DI category exist in this current table format. Total MF CAM amount including DI costs are $223,581.

	A	B	C	D	E
1	**PY 2018 Energy Savings Assistance Program Annual Report** **ESA Program Table 3** **Program Cost Effectiveness** **SOUTHERN CALIFORNIA GAS COMPANY**				
2	**Ratio of Benefits Over Costs**			**Net Benefits $**	
3	**ProgramYear**	**ESACET**	**Resource TRC**	**ESACET**	**Resource TRC**
4	**2018**	0.66	0.37	$ (30,286,598)	$ (23,107,359)
5					
6	Notes:				
7	- All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC.				
8	- The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.				
9	- The Resource TRC includes energy benefits and program measure and installation costs.				
10	- Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.				
11	- Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.				

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 4

Detail by Housing Type and Source[1]

SOUTHERN

CALIFORNIA GAS COMPANY

Customer	Housing Type	2018 Energy Savings[2] # Homes Treated	(mWh)	MW	(mTherm)	2018 Expenses
Gas and Electric Customers						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Electric Customers (only)						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Gas Customers (only)						
Owners - Total		**57,849**	-	-	**1,117,252**	**$60,890,314.01**
	Single Family	50,795			6,018	$54,982,528.44
	Multi Family	762			96,001	$646,496.36
	Mobile Homes	6,292			1,015,233	$5,261,289.21
Renters - Total		**41,608**	-	-	**458,258**	**$22,321,824.18**
	Single Family	16,946			147,447	$11,520,314.86
	Multi Family	24,008			10,119	$10,474,086.43
	Mobile Homes	654			300,691	$327,422.89
Gas and Electric Total						
Multi Family Common Area Bldgs - Total						
Totals:		**99,457**	-	-	**1,575,510**	**$ 83,212,138**

[1] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.
[2] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.

Penetration History				
Year	**Homes Treated[3]**	**Ineligible & Unwilling[4]**	**Estimated Eligible in Current Year[5]**	**Current Year Penetration Rate for Homes Treated**
2002	49,464			
2003	57,179			
2004	54,677			
2005	40,523			
2006	36,870			
2007	44,048			
2008	58,773			
2009	83,493	3,562		
2010	120,358	22,589		
2011	161,020	23,765		
2012	96,893	20,383	136,836	71%
2013	106,948	12,310	136,836	78%
2014	92,967	10,029	136,836	68%
2015	80,316	8,819	136,836	59%
2016	69,811	12,656	136,836	51%
2017	93,790	10,017	110,000	85%
2018	99,457	14,860	169,910	59%
2019				
2020				
Total Homes Treated since 2002	**1,346,587**	**138,990**		

[3] Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. Also it includes first touches, go-back/retreatment, and CSD leveraging authorized in D.16-11-022 and D.17-12-009.
[4] Ineligible & Unwilling defined in ESA Table 8.
[5] Based on Attachment F of D.12-08-044, D.14-08-030, and Ordering Paragraph 79 of D.16-11-022.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2018	PG&E	85,799	3,952
2018	SCE	1,151,343	41,204
2018	SDG&E	18,273	110

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 5
ESA Program Direct Purchases & Installation Contractors [1]
SOUTHERNCALIFORNIA GAS COMPANY

	A	B	C	D	E	F	G
2			**Contractor Type (Check one or more if applicable)**				**2018 Annual**
3	**Contractor**	**County [2]**	**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Expenditures [3]**
4	ADVANCED CONTRACTING SERVICES INC	Ke	x	-	-	-	$ 225,247
5	AMERICAN ECO SERVICES INC	SD, Sba, SLO	x	-	x	-	$ 1,271,355
6	AMERICAN INSULATION INC	R, I	x	-	x	-	$ 1,425,727
7	APPLIANCE RECYCLING CENTERS OF	LA	x	-	-	-	$ 1,876,137
8	ARCA RECYCLING INC	LA	x	-	-	-	$ 2,252,782
10	ASSERT INC	LA, Ke	-	x	-	-	$ 661,511
11	ASSOCIATED CONSTRUCTION SERVICES	LA, OC, Sbe, R	x	-	x	-	$ 2,411,098
12	AVALON CARVER COMMUNITY CENTER INC	LA	-	x	-	-	$ 112,032
15	CAMPESINOS UNIDOS INC	R, I	-	x	x	x	$ 630,117
16	COMMUNITY ACTION COMMISSION	Sba	-	x	-	x	$ 15,302
17	COMMUNITY ACTION OF VENTURA COUNTY	V, LA	-	x	-	x	$ 51,565
19	COMMUNITY ACTION PARTNERSHIP OF	SLO,	-	x	x	x	$ 203,727
21	COMMUNITY ACTION PARTNERSHIP OF O C	OC	-	x	x	x	$ 95,012
24	EAGLE SYSTEMS INTERNATIONAL INC	LA, R, T, Ki	x	-	-	-	$ 3,470,139
25	EAST LOS ANGELES COMMUNITY UNION	LA, R, OC, Sbe	-	x	x	-	$ 15,362,615
28	ECONO WEST INC	LA, Ke	x	-	x	-	$ 2,097,789
30	ENVIRONMENTAL ASSESSMENT SERVICES	I, LA, OC, R, Sbe	x	-	x	-	$ 1,177,725
31	FCI MANAGEMENT CONSULTANTS	LA, OC, SD	x	-	x	-	$ 147,862
32	GARCIA & SONS HOME IMPROVEMENT INC	Ke, LA, T, Ki, F	x	-	x	-	$ 405,094
35	HIGHLANDS ENERGY SERVICES INC	T, Ki, F	x	-	x	-	$ 1,824,263
36	JOHN HARRISON CONTRACTING INC	R, Sbe	x	-	x	-	$ 249,517
38	MARAVILLA FOUNDATION	LA, OC, Sbe, R, K	-	x	x	x	$ 13,651,067
41	PACIFIC ASIAN CONSORTIUM IN	ALL, LA, OC, V, Sbe, R, SFERN	-	x	x	x	$ 477,275
43	PROTEUS INC	T, LA, OC, V, Sbe, R, I, SC, SFERN, Ki, Ke, Sba, SLO, F	-	x	-	-	$ 5,183,184
44	QUALITY CONSERVATION SERVICES INC	LA, OC, Sbe, R, SC, SF, CC, S	x	-	-	-	$ 2,908,312
45	RELIABLE ENERGY MANAGEMENT INC	LA, OC, V, Sbe, R, SFERN, T, Ki, Ke, Sba, SLO, F	x	-	x	-	$ 10,285,288
46	RICHARD HEATH & ASSOCIATES INC	ALL, LA, OC, V, Sbe, R, I, Ke, Sba, SLO	x	-	x	-	$ 1,028,916
47	SIERRA WEATHERIZATION COMPANY INC	LA, V, OC, SC, AL, Scr	x	-	-	-	$ 6,756,817
48	SILICON VALLEY FOUNDATION	SC, OC, LA	x	-	x	-	$ 2,383,830
49	SOCO AIR CONDITIONING CO	LA, OC, R, Sbe	x	-	-	-	$ 297,821
51	SPECIALTY AC HEAT INC	SBN, LA, RIVR, SFERN, OC	x	-	x	-	$ 1,608,421
52	STAPLES & ASSOCIATES	T, Ki, F, Ke	x	-	-	-	$ 633,483
55	TONY'S HEATING & A/C SERVICE INC.	LA, OC, SFERN	x	-	x	x	$ 529,921
56	TRI-STATE HOME IMPROVEMENTS INC	R	x	-	x	-	$ 210,228
57	TRUTEAM OF CALIFORNIA INC	LA, R, Sbe, I, Ke, Ki, Tu, OC, V, T, F, SFERN	x	-	-	x	$ 5,041,888
58	VETERANS IN COMMUNITY SERVICES INC	LA	-	x	x	-	$ 933,314
59	WATTS LABOR COMMUNITY ACTION COMM	LA	-	x	x	-	$ 41,880
62	**Total Contractor Expenditures**						**$ 87,938,261**

[1] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.

[2] Key

Alameda	AL
Los Angeles	LA
Orange County	OC
Ventura	V
San Bernadino	Sbe
Riverside	R
Imperial	I
Tulare	T
Kings	Ki
Kern	Ke
Santa Barbara	Sba
San Luis Obispo	SLO
Fresno	F
San Diego	SD
San Fernando	SFERN
Santa Clara	SC
San Francisco	SF
Santa Cruz	Scr
Contra Costa	CC
Solano	S

[3] The expenditures do not include a credit of ($153,681) for the high efficiency clothes washer rebates from Municipal Water Companies, misc. revenues, adjustments of ($239,228), and other writeoffs of ($368,668). Calculated as follows: $87,938,261 - $153,681 - $239,228 - $386,668 = $87,158,684. (See ESAP Table - 7 Contract)

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 6
ESA Program Installation Cost of Program Installation Contractors [1]
SOUTHERN CALIFORNIA GAS COMPANY

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2018 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs						Cost/
		Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	Households	Costs [2]	Cost/ Unit	Household
Dwellings	Each	73,183	74%	73,183	74%	$ 42,511,573	68%	26,274	26%	26,274	26%	$ 20,259,017	32%	99,457	99,457	$ 62,770,590	$ 631	$ 631
Appliances																		
High Efficiency Clothes Washer	Each	-	0%	-	0%	$ -	0%	5,076	100%	5,076	100%	$ 4,129,661	100%	5,076	5,076	$ 4,128,076	$ 813	$ 813
Refrigerators (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Microwaves (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Domestic Hot Water																		
Water Heater Blanket	Home	848	38%	848	38%	$ 48,667	38%	1,399	62%	1,399	62%	$ 80,217	62%	2,247	2,247	$ 128,883	$ 57	$ 57
Low Flow Shower Head	Home	89,205	71%	64,586	74%	$ 2,827,418	71%	36,233	29%	22,765	26%	$ 1,147,604	29%	125,438	87,351	$ 3,975,023	$ 32	$ 46
Water Heater Pipe Insulation	Home	1,143	62%	1,038	60%	$ 22,987	60%	700	38%	678	40%	$ 15,040	40%	1,843	1,716	$ 38,027	$ 21	$ 22
Faucet Aerator	Home	117,698	77%	61,921	78%	$ 861,348	77%	34,803	23%	17,701	22%	$ 255,022	23%	152,501	79,622	$ 1,116,370	$ 7	$ 14
Water Heater Repair/Replacement	Each	1,730	86%	1,729	86%	$ 3,083,983	85%	278	14%	277	14%	$ 530,964	15%	2,008	2,006	$ 3,614,946	$ 1,800	$ 1,802
Thermostatic Shower Valve	Each	71,097	70%	52,072	73%	$ 3,162,828	70%	30,504	30%	19,289	27%	$ 1,357,072	30%	101,601	71,361	$ 4,519,900	$ 44	$ 63
New - Combined Showerhead/TSV (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Heat Pump Water Heater (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Tub Diverter/ Tub Spout	Each	3,317	74%	2,680	75%	$ 354,544	74%	1,161	26%	886	25%	$ 127,334	0%	4,478	3,566	$ 481,878	$ 108	$ 135
New - Thermostat-controlled Shower Valve	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Enclosure																		
Air Sealing / Envelope	Home	871,330	73%	56,838	72%	$ 13,776,613	70%	324,773	27%	21,819	28%	$ 5,778,103	30%	1,196,103	78,657	$ 19,554,717	$ 16	$ 249
Attic Insulation	Home	2,915,181	48%	2,777	49%	$ 3,745,312	48%	3,135,820	52%	2,880	51%	$ 4,052,787	52%	6,051,001	5,657	$ 7,798,100	$ 1	$ 1,378
HVAC																		
FAU Standing Pilot Light Conversion	Each	1	50%	1	50%	$ 729	68%	1	50%	1	50%	$ 347	32%	2	2	$ 1,076	$ 538	$ 538
Furnace Repair/Replacement	Each	7,688	88%	7,548	88%	$ 12,494,092	86%	1,022	12%	1,003	12%	$ 1,985,548	14%	8,710	8,551	$ 14,479,640	$ 1,662	$ 1,693
Room A/C Replacement (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Central A/C Replacement (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Heat Pump Replacement (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Coolers (Replacement) (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Coolers (Installation) (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Duct Testing and Sealing (N/A)	Home	516	59%	516	60%	$ 320,039	66%	353	41%	351	40%	$ 161,785	34%	869	867	$ 481,824	$ 554	$ 556
New - Energy Efficient Fan Control (N/A)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Prescriptive Duct Sealing	Home	4,360	65%	4,299	66%	$ 436,791	65%	2,302	35%	2,177	34%	$ 234,803	35%	6,662	6,476	$ 671,594	$ 101	$ 104
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - A/C Time Delay (N/A)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Maintenance																		
Furnace Clean and Tune	Home	25,701	78%	25,036	79%	$ 1,381,399	78%	7,069	22%	6,704	21%	$ 397,553	22%	32,770	31,740	$ 1,778,952	$ 54	$ 56
Central A/C Tune-up (N/A)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Cooler Maintenance (N/A)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Lighting																		
Compact Fluorescent Lights (CFLs) (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Interior Hard wired CFL fixtures (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Exterior Hard wired CFL fixtures (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Torchiere (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Occupancy Sensor (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
LED Night Lights (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - LED Diffuse Bulb (60W Replacement) (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - LED Reflector Bulb (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - LED Reflector Downlight Retrofit Kits (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - LED A-Lamps (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Miscellaneous																		
Pool Pumps (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Smart Power Strips (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Smart Power Strips - Tier 2 (N/A)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Ancillary Services																		
Commissioning	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Audit	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Administration	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Pilots																		
	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Outreach & Assessment																		
Customer Enrollment	Home	94,283	83%	94,283	83%	$ 15,640,752	81%	18,633	17%	18,633	17%	$ 3,619,287	19%	112,916	112,916	$ 19,260,039	$ 171	$ 171
In-Home Education	Home	63,782	81%	63,782	81%	$ 956,715	81%	15,106	19%	15,106	19%	$ 226,380	19%	78,888	78,888	$ 1,183,095	$ 15	$ 15

[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.
[2] The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1.

	A	B	C	D	E
1	**PY 2018 Energy Savings Assistance Program Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element [1] SOUTHERN CALIFORNIA GAS COMPANY**				
2	**ESA Program:**	**Labor [1]**	**Non-Labor [2]**	**Contractor [3]**	**Total**
3	Energy Efficiency				
4	Appliances	$ -	$ -	$ 3,735,217	$ 3,735,217
5	Domestic Hot Water	$ -	$ -	$ 13,868,894	$ 13,868,894
6	Enclosure	$ -	$ -	$ 30,152,972	$ 30,152,972
7	HVAC	$ -	$ 105	$ 15,698,667	$ 15,698,772
8	Maintenance	$ -	$ -	$ 1,781,776	$ 1,781,776
9	Lighting	$ -	$ -	$ -	$ -
10	Miscellaneous	$ -	$ -	$ -	$ -
11	Customer Enrollment	$ 279,734	$ 5,348	$ 19,297,686	$ 19,582,768
12	In Home Education	$ -	$ 192,677	$ 1,190,505	$ 1,383,182
13	Pilot	$ -	$ -	$ -	$ -
14	**Energy Efficiency TOTAL**	**$ 279,734**	**$ 198,131**	**$ 85,725,716**	**$ 86,203,580**
15					
16	Training Center	$ 605,868	$ 126,447	$ -	$ 732,315
17	Inspections	$ -	$ -	$ 1,432,968	$ 1,432,968
18	Marketing and Outreach	$ 18,905	$ 361,690	$ -	$ 380,595
19	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
20	Measurement and Evaluation Studies	$ -	$ 100,437	$ -	$ 100,437
21	Regulatory Compliance	$ 315,154	$ 81,380	$ -	$ 396,534
22	General Administration	$ 3,989,694	$ 1,008,439	$ -	$ 4,998,134
23	CPUC Energy Division	$ -	$ 24,410	$ -	$ 24,410
24					
25	**TOTAL PROGRAM COSTS [4]**	**$ 5,209,354**	**$ 1,900,933**	**$ 87,158,684**	**$ 94,268,971**
26					
27	[1] Labor: Utility staff labor including labor indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects)				
28	[2] Non-Labor: All other non-labor costs excluding contractor costs defined below.				
29	[3] Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In Home Energy Education services.				
30	[4] Total Program Cost does not include MF CAM in the amount of $223,581 due to the fact that Table 7 approved format does not display this category. Therefore, total 2018 program cost including MF CAM equals of $94,492,552 or ($94,268,971 + $223,581)				

PY 2018 Energy Savings Assistance Program Annual Report [1]
ESA Program Table 8
ESA Program Homes Unwilling / Unable to Participate
SOUTHERN CALIFORNIA GAS COMPANY

	Reason Provided						
County	**Customer Unwilling/Declined Program Measures**	**Customer Unavailable - Scheduling Conflicts**	**Hazardous Environment (unsafe/unclean)**	**Landlord Refused to Authorize Participation**	**Household Income Exceeds Allowable Limits**	**Unable to Provide Required Documentation**	**Other Infeasible/ Ineligible**
Fresno	20	169	0	0	6	1	4
Imperial	14	10	0	0	10	1	3
Kern	81	86	0	0	21	5	4
Kings	105	126	0	0	7	2	5
Los Angeles	2,186	1,172	0	0	217	78	123
Orange	674	295	0	0	123	22	57
Riverside	2,558	545	0	0	229	84	87
San Bernardino	3,463	753	0	0	57	30	19
San Luis Obispo	8	2	0	0	3	0	2
Santa Barbara	2	4	0	0	1	0	0
Tulare	587	596	0	0	16	4	14
Ventura	72	68	0	0	13	2	14
Total	**9,770**	**3,826**	**0**	**0**	**703**	**229**	**332**

[1] Summary data which includes ESA Program and CSD Leveraging efforts.

ESA Coordinated Treatment (SCE and SoCalGas only)

	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]				
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency [2]	**# of Customer Unwilling/Declined Program Measures**	**# of Customer Unavailable - Scheduling Conflicts**	**# of Hazardous Environment (unsafe/unclean)**	**# of Landlord Refused to Authorize Participation**	**# of Other Infeasible/ Ineligible**
3,455	**399**	**2,116**	**1**	**267**	**672**

[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.

[2] Total homes reported treated by SCE in 2018, within the joint SoCalGas-SCE territory, that were not treated by SoCalGas in 2018 for the reasons provided at right. In addition to the homes shown in this table, there were 5,324 homes reported treated by SCE in 2018 within SoCalGas-SCE joint territory that could not be matched to a SoCalGas service address and therefore could not be assessed as to whether they were jointly treated. The table also excludes additional units reported treated by SCE but not by SoCalGas in 2018, within the joint SCE-SoCalGas territory, as follows: 20,222 homes treated in prior years 2002-2017 by SoCalGas; 1,215 homes not jointly treated for unknown reasons; 2,499 homes for which a SoCalGas enrollment remained in progress at year end.

	A	B	C	D	E	F	G
1	**PY 2018 Energy Savings Assistance Program Annual Report** **ESA Program Table 9** **Life Cycle Bill Savings by Measure [1, 3]** **SOUTHERN CALIFORNIA GAS COMPANY**						
2	**Measure Description**		**2018 Number Installed**	**Per Measure Electric Impact (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (EUL)**	**2018 Total Measure Life Cycle Bill Savings**
3	**Appliances**						
4	High Efficiency Clothes Washer	Each	5,076		156,747	11	$ 1,143,060
5	Refrigerators	Each					
6	Microwaves [2]	Each					
7	**Domestic Hot Water**						
8	Water Heater Blanket	Home	2,247		5,393	4	$ 12,203
9	Low Flow Shower Head	Home	87,351		128,472	10	$ 867,370
10	Water Heater Pipe Insulation	Home	1,716		3,059	11	$ 22,306
11	Faucet Aerator	Home	79,622		265,731	10	$ 1,794,059
12	Water Heater Repair/Replacement	Each	1,985		6,885	11	$ 50,183
13	Thermostatic Shower Valve	Each	101,601		245,006	10	$ 1,121,231
14	New - Combined Showerhead/TSV	Each					
15	New - Heat Pump Water Heater	Each					
16	New - Thermostatic Tub Spout	Each	4,478		35,857	10	$ 193,880
17	New - Thermostat-controlled Shower Valve	Each					
18	New - MF CAM Central Water Heater	Home	91		2,517	20	$ 28,364
19	**Enclosure**						
20	Air Sealing / Envelope	Home	78,657		353,885	11	$ 2,580,665
21	Attic Insulation	Home	5,657		150,823	20	$ 1,699,599
22	**HVAC**						
23	FAU Standing Pilot Light Conversion	Each	2		84	7	$ 365
24	Furnace Repair/Replacement	Each	8,674		-	20	$ -
25	Room A/C Replacement	Each					
26	Central A/C Replacement	Each					
27	Heat Pump Replacement	Each					
28	Evaporative Coolers (Replacement)	Each					
29	Evaporative Coolers (Installation)	Each					
30	Duct Testing and Sealing	Home	867		13,292	18	$ 140,013
31	New - Energy Efficient Fan Control	Home					
32	New - Prescriptive Duct Sealing	Home	6,476		18,557	18	$ 200,819
33	New - High Efficiency Forced Air Unit (HE FAU	Home					
34	New - A/C Time Delay	Home					
35	**Maintenance**						
36	Furnace Clean and Tune	Home	31,740		191,718	5	$ 705,775
37	Central A/C Tune-up	Home					
38	Evaporative Cooler Maintenance	Home					
39	**Lighting**						
40	Compact Fluorescent Lights (CFLs)	Each					
41	Interior Hard wired CFL fixtures	Each					
42	Exterior Hard wired CFL fixtures	Each					
43	Torchiere	Each					
44	Occupancy Sensor	Each					
45	LED Night Lights	Each					
46	New - LED Diffuse Bulb (60W Replacement)	Each					
47	New - LED Reflector Bulb	Each					
48	New - LED Reflector Downlight Retrofit Kits	Each					
49	New - LED A-Lamps	Each					
50	**Miscellaneous**						
51	Pool Pumps	Each					
52	Smart Power Strips	Each					
53	New - Smart Power Strips - Tier 2	Each					
54	**Ancillary Services**						
55	Commissioning	Home					
56	Audit	Home					
57	Administration	Home					
58	**Pilots**						
59							
60							
61	**Total**		**416,240**				**$ 10,559,891**
62							
63	**Total Homes Served By the Program**		**99,457**				
64	**Life Cycle Bill Savings Per Home**	-					**$ 106.18**
65							
66	[1] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.						
67	[2] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
68	[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
69							
70	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.						

	A	B	C
1	**PY 2018 Energy Savings Assistance Program Annual Report** **ESA Program Table 10** **Energy Rate Used for Bill Savings Calculations [1]** **SOUTHERN CALIFORNIA GAS COMPANY**		
2	**Year**	**$/kWh**	**$/Therm[2]**
3	2018	N/A	0.61
4	2019	N/A	0.62
5	2020	N/A	0.64
6	2021	N/A	0.66
7	2022	N/A	0.68
8	2023	N/A	0.70
9	2024	N/A	0.72
10	2025	N/A	0.75
11	2026	N/A	0.77
12	2027	N/A	0.79
13	2028	N/A	0.81
14	2029	N/A	0.84
15	2030	N/A	0.86
16	2031	N/A	0.89
17	2032	N/A	0.92
18	2033	N/A	0.94
19	2034	N/A	0.97
20	2035	N/A	1.00
21	2036	N/A	1.03
22	2037	N/A	1.06
23	2038	N/A	1.10
24	2039	N/A	1.13
25	2040	N/A	1.16
26	2041	N/A	1.20
27			
28	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.		
29	[2] Actual 2018 energy rate per therm paid by ESA Program participants. Energy rate beyond 2018 is escalated 3% annually.		
30			

	A	B	C	D	E
1	**PY 2018 Energy Savings Assistance Program Annual Report** **ESA Program Table 11** **Bill Savings Calculations by Program Year[1]** **SOUTHERN CALIFORNIA GAS COMPANY**				
2	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
3	2013	$ 97,554,614	$ 14,434,223	0.15	$ 135.00
4	2014	$ 93,781,355	$ 13,802,052	0.15	$ 147.00
5	2015	$ 74,817,588	$ 9,458,585	0.13	$ 118.00
6	2016	$ 58,777,190	$ 10,005,458	0.17	$ 143.32
7	2017	$ 79,364,204	$ 10,752,700	0.14	$ 114.65
8	2018	$ 93,149,896	$ 10,559,891	0.11	$ 106.18
9					
10	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 12
Fund Shifting [1]
SOUTHER CALIFORNIA GAS COMPANY

											FUND SHIFT AMOUNT													
		Budget [1]			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year 1-4			Carry Forward from 2017			Carry Back from 2019							
Date	Program Year 2018	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
	ESA Program:	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	*($x,xxx)*	*x%*				*G-xxxx, D.xx- xx-xxx*
	Energy Efficiency																								
	Appliance	$ -	$ 17,117,000	**$ 17,117,000**	$ -	$ 3,735,217	**$ 3,735,217**	$ -	$ 13,381,783	**$ 13,381,783**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water	$ -	$ 20,236,546	**$ 20,236,546**	$ -	$ 13,868,894	**$ 13,868,894**	$ -	$ 6,367,652	**$ 6,367,652**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure	$ -	$ 32,374,249	**$ 32,374,249**	$ -	$ 30,152,972	**$ 30,152,972**	$ -	$ 2,221,277	**$ 2,221,277**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC	$ -	$ 23,488,373	**$ 23,488,373**	$ -	$ 15,698,772	**$ 15,698,772**	$ -	$ 7,789,601	**$ 7,789,601**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance	$ -	$ 1,937,734	**$ 1,937,734**	$ -	$ 1,781,776	**$ 1,781,776**	$ -	$ 155,958	**$ 155,958**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Miscellaneous	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Customer Enrollment	$ -	$ 18,515,920	**$ 18,515,920**	$ -	$ 18,515,920	**$ 18,515,920**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	In Home Education	$ -	$ 3,798,033	**$ 3,798,033**	$ -	$ 1,383,182	**$ 1,383,182**	$ -	$ 2,414,851	**$ 2,414,851**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Fund Shifting Offset	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	**$ -**	**$ 117,467,855**	**$ 117,467,855**	**$ -**	**$ 85,136,732**	**$ 85,136,732**	**$ -**	**$ 32,331,123**	**$ 32,331,123**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center	$ -	$ 908,314	**$ 908,314**	$ -	$ 732,315	**$ 732,315**	$ -	$ 175,999	**$ 175,999**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	$ -	$ 2,341,714	**$ 2,341,714**	$ -	$ 1,432,968	**$ 1,432,968**	$ -	$ 908,746	**$ 908,746**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach	$ -	$ 1,450,000	**$ 1,450,000**	$ -	$ 380,595	**$ 380,595**	$ -	$ 1,069,405	**$ 1,069,405**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	M&E Studies [2]	$ -	$ 153,125	**$ 153,125**	$ -	$ 100,437	**$ 100,437**	$ -	$ 52,688	**$ 52,688**	$ -	$ -	**$ -**	$ -	$ -	**$ -**		$ 24,657	**$ 24,657**	$ 24,657	-0.02%	1. 2. 3. Carried back from 2019 M&E authorized budget.	1. 2. 3. To 2018 From 2019	1. 2. 3. 2019 M&E authorized budget to fund 2018 spend.	1. 2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules. 3.
	Regulatory Compliance	$ -	$ 344,307	**$ 344,307**	$ -	$ 344,307	**$ 344,307**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration	$ -	$ 6,500,414	**$ 6,500,414**	$ -	$ 4,998,134	**$ 4,998,134**	$ -	$ 1,502,280	**$ 1,502,280**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division	$ -	$ 86,000	**$ 86,000**	$ -	$ 24,410	**$ 24,410**	$ -	$ 61,590	**$ 61,590**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	**$ -**	**$ 129,251,729**	**$ 129,251,729**	**$ -**	**$ 93,149,896**	**$ 93,149,896**	**$ -**	**$ 36,101,833**	**$ 36,101,833**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 24,657**	**$ 24,657**	**$ 24,657**	**0%**				
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ -**	**$ 129,276,386**	**$ 129,276,386**	**$ -**	**$ 93,149,896**	**$ 93,149,896**	**$ -**	**$ 36,126,490**	**$ 36,126,490**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**					

[1] Reflects the authorized funding in D.16-11-022. Additional funds allocated from prior-cycle unspent budgets as ordered in G-3532 dated December 14, 2017, Non-Standard Disposition of Clear Plan AL 5256, dated May 18, 2018, and Non-Standard Disposition of Mid-Cycle AL 5325, dated December 19, 2018 are not shown on this table but appear on Table 1A.

[2] Previous carryback from 2018 to 2017 amounted to $77,345 which resulted in 2018 available budget of $75,780, therefore, carryback from 2019 of $24,657 was needed. Measurement and Evaluation studies authorized 2017 - 2020 budget is $500,000 per Resolution G-3532.

Note: Numbers reported in standard accounting format, with negative amounts displayed in parentheses ($xxx).

	A	B
1	**PY 2018 Energy Savings Assistance Program Annual Report**	
2	**ESA Program Table 13**	
3	**Categorical and Other Enrollment [1]**	
4	**SOUTHERN CALIFORNIA GAS COMPANY**	
5		
6	**Type of Enrollment**	**Number of Homes Treated**
7	Women, Infants, and Children Program (WIC)	4,802
8	Supplemental Security Income (SSI)	1,959
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,410
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	168
11	Tribal TANF	2
12	Medicaid/Medi-Cal for Families	22,379
13	Healthy Families A&B	2
14	National School Lunch Program (NSLP) - Free Lunch	805
15	Low-income Home Energy Assistance Program (LIHEAP)	185
16	Bureau of Indian Affairs General Assistance	94
17	Head Start Income Eligible - (Tribal Only)	0
18	**Total**	**31,806**
19		
20	[1] Summary data which includes ESA Program and CSD Leveraging	
21	Note: Does not include MF common area efforts.	

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 14
Leveraging & Integration [6]
SOUTHERN CALIFORNIA GAS COMPANY

Coordination Type [1]	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Leveraging	Anaheim Public Utilities (APU)	SoCalGas has a signed leveraging contract with APU	Yes	Yes	$ 1,108,839	N/A	N/A	1,052	See note "A".	Yes	N/A
Leveraging	Colton Public Utilities	SoCalGas has a signed leveraging contract with Colton	Yes	Yes	$ 80,404	N/A	N/A	258	See note "A".	Yes	N/A
Leveraging	Los Angles Department of Water & Power (LADWP)	SoCalGas has a signed leveraging contract with LADWP	Yes	Yes	$ 1,017,266	4,172,546	N/A	6,253	See note "A".	Yes	N/A
Leveraging	Pasadena Water and Power (PWP)	SoCalGas has a signed leveraging contract with PWP	Yes	Yes	$ 139,659	N/A	N/A	137	See note "A".	Yes	N/A
Leveraging	Riverside Public Utilities (RPU)	SoCalGas has a signed leveraging contract with RPU	Yes	Yes	$ 139,669	N/A	N/A	106	See note "A".	Yes	N/A
Leveraging	Easern Municipal Water District (EWMD)	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	$ 23,790	3,840,072	N/A	366	See note "A".	Yes	N/A
Leveraging	Liberty Utilities, formerly Park Water	Liberty Utilities co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	$ 23,780	9,414,331	N/A	1,079	See note "A".	Yes	N/A
Leveraging	Fontana Water Company	Fontana Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	$ 35,400	2,476,112	N/A	236	See note "A".	Yes	N/A
Leveraging	Metropolitan Water District	Metropolitan Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	$ 248,795	30,710,084	N/A	2,927	See note "A".	Yes	N/A
Leveraging	San Gabriel Valley Water Company	San Gabriel Valley Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	$ 12,250	860,344	N/A	82	See note "A".	Yes	N/A

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved / leveraged by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

[3] Annual Energy savings/benefits for measures installation in 2018. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Column G & H represents energy savings for kWh and gallons

[4] Total Enrollments. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served. Enrollments represent joint customer participation in both utility programs.

[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings. See Note "A".

[6] Summary data which includes ESA Program and MF common area efforts.

Fields not applicable to specific efforts are marked "N/A"

"A"	Dollar savings based on invoiced amount for co-funded measures.
	Enrollments calculated by dividing (dollar savings) by (per measure cost). Result is additional customers that can be treated with High Efficiency Washer (rounded up).
	Therm savings calculated by multiplying (additional customers that can be treated with High Efficiency Washer) by (per measure therm savings).

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 15
Lighting [1]
SOUTHERN CALIFORNIA GAS COMPANY
ESA Program CFL Tracking Table

Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each

Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin) [2]	AB 1109 Compliant? [3]

Not Applicable to SCG

Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [4]
2009				
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				

[1] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.
[2] Bulb cost and admin cost were combined effective 2013.
[3] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?
Do all models comply with Europe's RoHS standards on toxicity?
[4] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.
Note: This Table should be used for 2017 and not applicable with 2018 activity pursuant to D.16-11-022 directive.

	A	B	C	D	E	F	G
1	**PY 2018 Energy Savings Assistance Program Annual Report**						
2	**ESA Program Table 16**						
3	**"Add Back" Measures**						
4	**SOUTHERN CALIFORNIA GAS COMPANY**						
5	**Ratio of Benefits Over Costs**						
6	**Measure [1, 2]**	**Climate Zone**	**ESACET**	**Resource TRC**	**Quantity Installed (Each or Home)**	**Budget Impact of "Add Back" [3]**	**Lifecycle Bill Savings Impact**
7	Air sealing, MF	4	1.98	0.68	22		$1,627
8	Air sealing, MF	5	2.39	1.17	140		$10,781
9	Air sealing, MF	6	0.10	0.01	468		$921
10	Air sealing, MF	8	0.29	0.04	5,008		$25,564
11	Air sealing, MF	9	0.33	0.05	7,399		$41,007
12	Air sealing, MF	10	1.68	0.43	1,805		$82,399
13	Air sealing, MF	13	2.05	0.65	309		$28,077
14	Air sealing, MF	14	2.49	1.10	172		$19,605
15	Air sealing, MF	15	0.13	0.02	411		$899
16	Air sealing, MF	16	1.56	0.37	426		$15,533
17	Air sealing, MH	4	2.01	0.70	27		$2,069
18	Air sealing, MH	5	1.95	0.66	86		$6,228
19	Air sealing, MH	6	2.21	0.78	189		$16,401
20	Air sealing, MH	8	0.29	0.04	433		$2,021
21	Air sealing, MH	9	0.81	0.14	328		$4,473
22	Air sealing, MH	10	2.30	0.87	3,318		$298,097
23	Air sealing, MH	13	1.96	0.59	267		$21,612
24	Air sealing, MH	14	2.11	0.69	431		$43,939
25	Air sealing, MH	15	0.00	0.00	551		$0
26	Air sealing, MH	16	2.38	0.95	112		$11,377
27	Air sealing, SF	4	1.56	0.41	135		$10,239
28	Air sealing, SF	5	1.37	0.33	902		$67,422
29	Air sealing, SF	6	0.14	0.02	1,129		$4,528
30	Air sealing, SF	8	0.17	0.02	13,925		$69,052
31	Air sealing, SF	9	0.24	0.03	8,501		$59,513
32	Air sealing, SF	10	1.18	0.24	17,141		$658,744
33	Air sealing, SF	13	1.47	0.34	8,574		$710,284
34	Air sealing, SF	14	1.85	0.52	2,902		$304,740
35	Air sealing, SF	15	0.00	0.00	1,915		$0
36	Air sealing, SF	16	1.02	0.19	1,631		$63,513
37	Attic insulation, MF	4	N/A	N/A	0		$0
38	Attic insulation, MF	5	N/A	N/A	0		$0
39	Attic insulation, MF	6	0.66	0.56	25		$7,863
40	Attic insulation, MF	8	0.63	0.52	98		$30,833
41	Attic insulation, MF	9	0.63	0.52	88		$27,816
42	Attic insulation, MF	10	0.56	0.41	10		$2,714
43	Attic insulation, MF	13	0.41	0.25	2		$497
44	Attic insulation, MF	14	N/A	N/A	0		$0
45	Attic insulation, MF	15	0.19	0.09	2		$98
46	Attic insulation, MF	16	0.17	0.08	2		$98
47	Attic insulation, SF	4	0.23	0.12	6		$711
48	Attic insulation, SF	5	0.39	0.24	66		$17,329
49	Attic insulation, SF	6	0.50	0.33	211		$67,242
50	Attic insulation, SF	8	0.53	0.38	1,792		$565,626
51	Attic insulation, SF	9	0.51	0.35	1,432		$446,993
52	Attic insulation, SF	10	0.45	0.28	768		$224,929
53	Attic insulation, SF	13	0.40	0.23	749		$191,933
54	Attic insulation, SF	14	0.41	0.25	163		$40,024
55	Attic insulation, SF	15	0.51	0.35	52		$19,296
56	Attic insulation, SF	16	0.47	0.31	191		$55,595
57	Duct sealing and testing, MF	All	0.00	0.00	5		$0
58	Duct sealing and testing, MH	All	N/A	N/A	0		$0
59	Duct sealing and testing, SF	All	0.61	0.44	864		$140,013
60	New - Prescriptive Duct Sealing, MF	All	0.00	0.00	109		$0
61	New - Prescriptive Duct Sealing, MH	All	0.33	0.16	169		$1,868

	A	B	C	D	E	F	G
62	New - Prescriptive Duct Sealing, SF	All	0.63	0.46	6,384		$198,951
63	FAU standing pilot light conversion, MF	All	N/A	N/A	0		$0
64	FAU standing pilot light conversion, MH	All	N/A	N/A	0		$0
65	FAU standing pilot light conversion, SF	All	0.59	0.49	2		$365
66	Furnace clean and tune, MF	4	0.60	0.12	2		$15
67	Furnace clean and tune, MF	5	0.63	0.13	16		$124
68	Furnace clean and tune, MF	6	0.65	0.12	250		$1,933
69	Furnace clean and tune, MF	8	0.66	0.12	2,400		$18,554
70	Furnace clean and tune, MF	9	0.65	0.12	3,708		$28,666
71	Furnace clean and tune, MF	10	0.84	0.17	1,206		$13,319
72	Furnace clean and tune, MF	13	0.80	0.16	78		$861
73	Furnace clean and tune, MF	14	0.83	0.17	105		$1,160
74	Furnace clean and tune, MF	15	0.41	0.07	139		$716
75	Furnace clean and tune, MF	16	0.48	0.08	260		$1,340
76	Furnace clean and tune, MH	4	0.95	0.22	3		$41
77	Furnace clean and tune, MH	5	0.56	0.11	6		$42
78	Furnace clean and tune, MH	6	0.00	0.00	17		$0
79	Furnace clean and tune, MH	8	1.85	0.65	42		$1,939
80	Furnace clean and tune, MH	9	1.80	0.61	76		$3,195
81	Furnace clean and tune, MH	10	0.00	0.00	634		$0
82	Furnace clean and tune, MH	13	0.00	0.00	50		$0
83	Furnace clean and tune, MH	14	0.00	0.00	64		$0
84	Furnace clean and tune, MH	15	2.34	1.27	107		$10,037
85	Furnace clean and tune, MH	16	0.07	0.01	16		$12
86	Furnace clean and tune, SF	4	0.59	0.12	48		$371
87	Furnace clean and tune, SF	5	0.00	0.00	478		$0
88	Furnace clean and tune, SF	6	1.84	0.64	401		$19,028
89	Furnace clean and tune, SF	8	1.85	0.65	4,544		$195,381
90	Furnace clean and tune, SF	9	1.78	0.59	2,646		$110,460
91	Furnace clean and tune, SF	10	1.17	0.27	9,326		$187,795
92	Furnace clean and tune, SF	13	0.00	0.00	1,893		$0
93	Furnace clean and tune, SF	14	0.00	0.00	1,591		$0
94	Furnace clean and tune, SF	15	2.28	1.18	1,000		$89,640
95	Furnace clean and tune, SF	16	1.60	0.48	634		$21,146
96	HE Clothes washer, MF	All	0.64	0.39	188		$42,336
97	HE Clothes washer, MH	All	0.64	0.40	378		$85,121
98	HE Clothes washer, SF	All	0.64	0.40	4,510		$1,015,603
99	Heating system, MF	4	N/A	N/A	0		$0
100	Heating system, MF	5	0.00	0.00	3		$0
101	Heating system, MF	6	0.00	0.00	24		$0
102	Heating system, MF	8	0.00	0.00	22		$0
103	Heating system, MF	9	0.00	0.00	25		$0
104	Heating system, MF	10	0.00	0.00	6		$0
105	Heating system, MF	13	N/A	N/A	0		$0
106	Heating system, MF	14	N/A	N/A	0		$0
107	Heating system, MF	15	N/A	N/A	0		$0
108	Heating system, MF	16	0.00	0.00	1		$0
109	Heating system, MH	4	N/A	N/A	0		$0
110	Heating system, MH	5	0.00	0.00	11		$0
111	Heating system, MH	6	0.00	0.00	22		$0
112	Heating system, MH	8	0.00	0.00	57		$0
113	Heating system, MH	9	0.00	0.00	51		$0
114	Heating system, MH	10	0.00	0.00	452		$0
115	Heating system, MH	13	0.00	0.00	43		$0
116	Heating system, MH	14	0.00	0.00	62		$0
117	Heating system, MH	15	0.00	0.00	42		$0
118	Heating system, MH	16	0.00	0.00	8		$0
119	Heating system, SF	4	0.00	0.00	7		$0
120	Heating system, SF	5	0.00	0.00	166		$0
121	Heating system, SF	6	0.00	0.00	137		$0
122	Heating system, SF	8	0.00	0.00	2,309		$0
123	Heating system, SF	9	0.00	0.00	1,384		$0
124	Heating system, SF	10	0.00	0.00	2,526		$0
125	Heating system, SF	13	0.00	0.00	542		$0
126	Heating system, SF	14	0.00	0.00	348		$0

	A	B	C	D	E	F	G
127	Heating system, SF	15	0.00	0.00	82		$0
128	Heating system, SF	16	0.00	0.00	185		$0
129	Low Flow Shower Head, MF	All	0.51	0.23	22,245		$139,672
130	Low Flow Shower Head, MH	All	0.48	0.21	5,569		$44,366
131	Low Flow Shower Head, SF	All	0.62	0.30	59,537		$683,331
132	Thermostatic Shower Valve, MF	All	0.43	0.18	17,148		$118,089
133	Thermostatic Shower Valve, MH	All	0.42	0.17	4,581		$41,444
134	Thermostatic Shower Valve, SF	All	0.70	0.37	49,632		$961,699
135	Water Heater Blanket, MF	All	0.15	0.07	200		$543
136	Water Heater Blanket, MH	All	0.22	0.10	250		$1,007
137	Water Heater Blanket, SF	All	0.29	0.15	1,797		$10,653
138	Water Heater Pipe Insulation, MF	All	0.61	0.41	201		$1,392
139	Water Heater Pipe Insulation, MH	All	0.74	0.61	423		$4,349
140	Water Heater Pipe Insulation, SF	All	0.86	0.89	1,092		$16,564
141	Water heater repair and replace, MF	All	0.00	0.00	29		$0
142	Water heater repair and replace, MH	All	0.05	0.02	273		$7,008
143	Water heater repair and replace, SF	All	0.05	0.02	1,682		$43,176
144	Faucet Aerator, MF	All	1.16	1.30	22,623		$305,475
145	Faucet Aerator, MH	All	1.24	1.66	5,089		$97,233
146	Faucet Aerator, SF	All	1.33	2.45	51,910		$1,391,351
147	Thermostatic Tub Spout, MF	4	0.96	0.76	1		$65
148	Thermostatic Tub Spout, MF	5	0.98	0.82	1		$70
149	Thermostatic Tub Spout, MF	6	0.96	0.72	22		$1,362
150	Thermostatic Tub Spout, MF	8	0.94	0.68	136		$8,045
151	Thermostatic Tub Spout, MF	9	0.94	0.69	266		$15,720
152	Thermostatic Tub Spout, MF	10	0.77	0.44	140		$8,219
153	Thermostatic Tub Spout, MF	13	0.96	0.72	2		$118
154	Thermostatic Tub Spout, MF	14	0.93	0.67	19		$1,164
155	Thermostatic Tub Spout, MF	15	0.76	0.44	8		$351
156	Thermostatic Tub Spout, MF	16	1.03	0.89	9		$685
157	Thermostatic Tub Spout, MH	4	0.91	0.68	2		$117
158	Thermostatic Tub Spout, MH	5	0.94	0.73	1		$63
159	Thermostatic Tub Spout, MH	6	0.93	0.67	2		$111
160	Thermostatic Tub Spout, MH	8	0.83	0.51	9		$476
161	Thermostatic Tub Spout, MH	9	0.79	0.47	15		$793
162	Thermostatic Tub Spout, MH	10	0.83	0.52	135		$7,088
163	Thermostatic Tub Spout, MH	13	0.80	0.48	11		$581
164	Thermostatic Tub Spout, MH	14	0.86	0.56	31		$1,694
165	Thermostatic Tub Spout, MH	15	0.68	0.36	4		$155
166	Thermostatic Tub Spout, MH	16	0.94	0.69	6		$409
167	Thermostatic Tub Spout, SF	4	0.74	0.44	8		$466
168	Thermostatic Tub Spout, SF	5	0.93	0.70	14		$879
169	Thermostatic Tub Spout, SF	6	0.88	0.60	66		$3,657
170	Thermostatic Tub Spout, SF	8	0.85	0.55	292		$15,459
171	Thermostatic Tub Spout, SF	9	0.84	0.54	216		$11,421
172	Thermostatic Tub Spout, SF	10	0.81	0.50	1,163		$61,058
173	Thermostatic Tub Spout, SF	13	0.78	0.45	665		$35,135
174	Thermostatic Tub Spout, SF	14	0.81	0.50	217		$11,857
175	Thermostatic Tub Spout, SF	15	0.69	0.37	40		$1,554
176	Thermostatic Tub Spout, SF	16	0.97	0.74	65		$4,426
177	MF CAM - Central Water Heater	All	1.27	48.92	91		$28,364
178							
179	[1] Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.						
180	[2] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.						
181	[3] Budgets for all current measures including “add-backs” were requested in SoCalGas’ application and conforming Advice Letters and approved in D.16-11-022 and G-3532; thus “add backs” will not impact SoCalGas’ ability to treat homes or install measures going forward.						

PY 2018 Energy Savings Assistance Program Annual Report

ESA Program Table 17

Expenditures for Pilots and Studies

SOUTHERN CALIFORNIA GAS COMPANY

	Authorized 2018 Funding			2018 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Pilots [1]	$ -	$ 500,000	$ 500,000	$ -	$ -	$ -	$ -	0%	0%
Total Pilots	**$0**	**$500,000**	**$500,000**	**$0**	**$0**	**$0**	**0%**	**0%**	**$0**
Studies									
Low Income Impact Evaluation [2, 3]	$ -	$ 34,375	$ 34,375	$ -	$ 91,389	$ 91,389	$ -	266%	266%
Low Income Needs Assessment [2]	$ -	$ 31,250	$ 31,250	$ -	$ -	$ -	$ -	0%	0%
Cost-Effectiveness/NEBs [2]	$ -	$ 37,500	$ 37,500	$ -	$ 9,047	$ 9,047	$ -	24%	24%
Rapid Feeback Research / Analysis [4]	$ -	$ 50,000	$ 50,000			$ -		0%	0%
Total Studies	**$0**	**$153,125**	**$153,125**	**$0**	**$100,437**	**$100,437**	**0%**	**66%**	**66%**

[1] Reflects the authorized funding per Clear Plan persuant to Resolution G-3532 .

[2] Statewide Low-Income EM&V study budgets are allocated at 25% to SoCalGas. This percentage is based on a cost allocation approved in D.17-12-009.

[3] Overspent due to timing of billing credit related to other IOUs and invoice payment.

[4] These funds are proposed to be used to conduct smaller-scale research projects and data analyses that may arise over the course of the program cycle and are planned in 2019 - 2020.

Note: Measurement and Evaluation studies authorized 2017 - 2020 budget is $500,000, where 2018 spend is shown to be under for 2018 due to annual budget allocation.

PY 2018 Energy Savings Assistance Program Annual Report
ESA Program Table 18
SOUTHERN CALIFORNIA GAS COMPANY

Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to Less than Six Occupants
Second Refrigerators	Each	N/A	N/A

Measures	Units	Households that Only Received Education
In-Home Education	Home	1,562

Households for My Energy/My Account Platform [1]		
Opt-Out	Already Enrolled	Opt-In
16,033	22,306	601

Households that Received ESA Program Measures and Elect to:
Opt-In to a New Program (DR or alternative tariff)
N/A

[1] Excludes homes enrolled prior to August 15, 2018, the date SoCalGas implemented in-home My Account enrollment as part of the ESA enrollment/energy education process.

Households Received A/C Cycling Controls when A/C Installed	
	# Installed
A/C Cycling Controls	N/A

PY 2018 CARE Annual Report

CARE Table 1

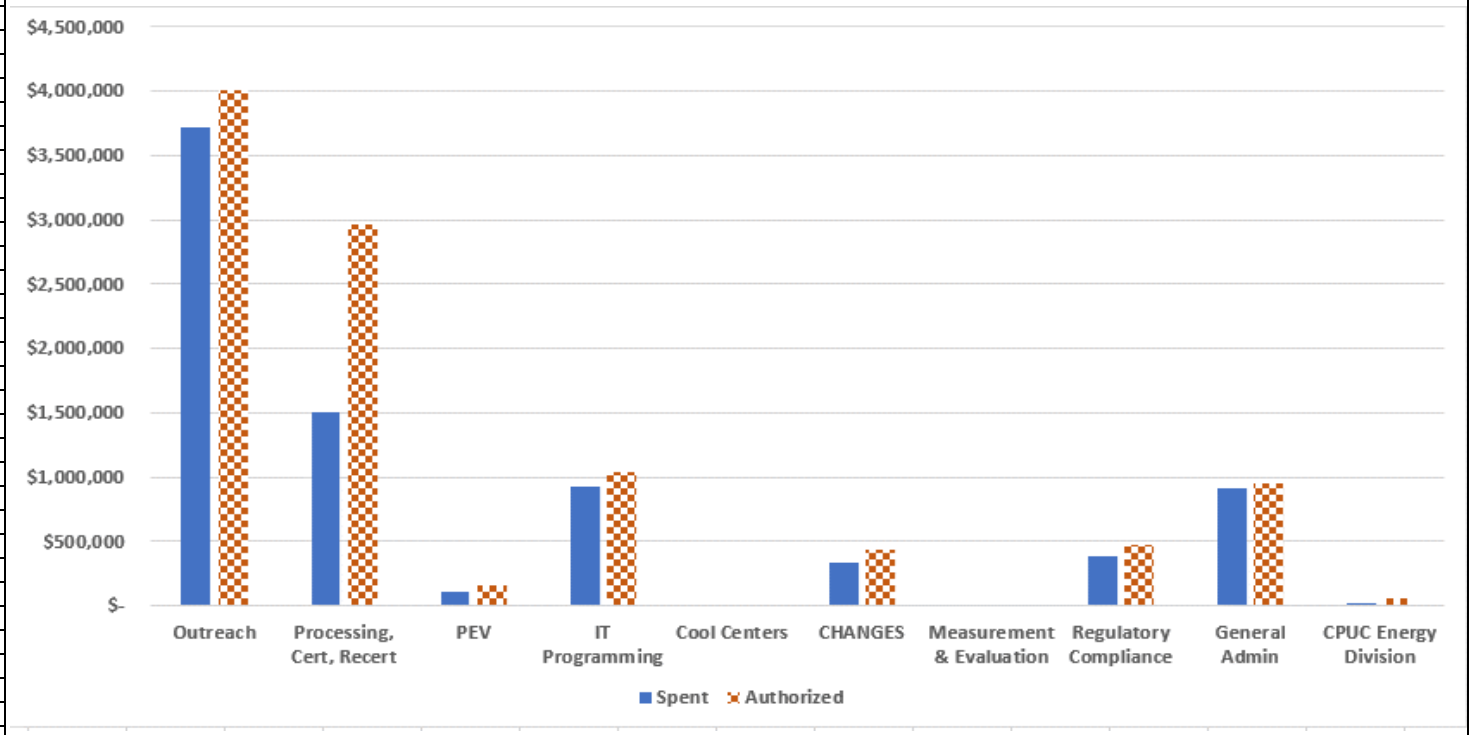
Overall Program Expenses

SOUTHERN CALIFORNIA GAS COMPANY

Category	Overall Expenditures		Total	Authorized Budget[1]	% of Budget Spent	Total Shifted	Shifted to/From/Other Comments?
	Electric	Gas					
Outreach	$ -	$ 3,712,959	$ 3,712,959	$ 4,004,885	93%		
Processing, Certification, Recertification	$ -	$ 1,505,054	$ 1,505,054	$ 2,966,518	51%		
Post Enrollment Verification	$ -	$ 112,060	$ 112,060	$ 154,833	72%		
IT Programming	$ -	$ 927,047	$ 927,047	$ 1,037,796	89%		
Cool Centers	$ -		$ -	$ -			
CHANGES	$ -	$ 336,933	$ 336,933	$ 437,502	77%		
Measurement & Evaluation	$ -		$ -	$ -			
Regulatory Compliance	$ -	$ 384,841	$ 384,841	$ 475,858	81%		
General Administration	$ -	$ 907,687	$ 907,687	$ 953,729	95%		
CPUC Energy Division	$ -	$ 24,410	$ 24,410	$ 60,000	41%		
TOTAL Program Costs	**$ -**	**$ 7,910,991**	**$ 7,910,991**	**$ 10,091,122**	**78.40%**	**$ -**	
CARE Rate Discount	$ -	$ 108,348,466	**$ 108,348,466**	$ 128,608,105	84.25%	$ -	
Service Establishment Charge Discount	$ -	$ 3,285,834	**$ 3,285,834**	$ 3,743,874	87.77%	$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	**$ -**	**$ 119,545,291**	**$ 119,545,291**	**$ 142,443,101**	**83.92%**	**$ -**	

[1] Reflects the authorized funding per year in D.16-11-022 and updated via Resolution G-3532 addressing conforming Advice Letters 5111-A and 5111-B.

Bar Chart 1 - Total Spent vs. Authorized by Category



PY 2018 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

SOUTHERN CALIFORNIA GAS COMPANY

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment				
	Automatic Enrollment				Self-Certification (Income or Categorical)																			
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)	Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)
January	4,759	1,778	109	6,646	8,414	10,469	253	1	19,137	25,783	14,159	14,914	11,886	40,959	12,502	1,410	320	9,695	23,927	66,742	1,856	1,565,982	1,789,906	87.49%
February	4,063	1,858	149	6,070	8,749	8,891	451	1	18,092	24,162	18,652	13,182	14,523	46,357	9,687	1,557	484	9,540	21,268	70,519	2,894	1,568,876	1,789,906	87.65%
March	3,952	2,105	194	6,251	8,663	10,294	4,127	4	23,088	29,339	22,632	18,483	19,190	60,305	4,833	1,801	555	11,684	18,873	89,644	10,466	1,579,342	1,789,906	88.24%
April	4,144	1,758	228	6,130	7,712	11,551	6,598	4	25,865	31,995	14,550	14,959	18,364	47,873	19,590	1,428	551	5,113	26,682	79,868	5,313	1,584,655	1,793,233	88.37%
May	4,878	2,705	194	7,777	5,664	11,510	6,811	1	23,986	31,763	14,975	15,009	18,100	48,084	10,973	1,676	416	5,494	18,559	79,847	13,204	1,597,859	1,793,233	89.10%
June	3,135	2,863	217	6,215	4,897	12,075	5,991	1	22,964	29,179	14,495	14,982	24,052	53,529	12,344	2,033	413	6,233	21,023	82,708	8,156	1,606,015	1,793,233	89.56%
July	2,811	1,837	151	4,799	4,852	9,511	5,671	0	20,034	24,833	11,692	26,520	16,847	55,059	11,683	2,228	463	8,067	22,441	79,892	2,392	1,608,407	1,792,502	89.73%
August	4,453	1,584	129	6,166	5,064	8,349	5,768	3	19,184	25,350	16,374	29,129	17,435	62,938	11,401	3,111	581	7,352	22,445	88,288	2,905	1,611,312	1,792,502	89.89%
September	5,116	1,563	108	6,787	4,678	7,551	5,628	0	17,857	24,644	12,395	19,213	17,032	48,640	11,367	2,840	489	6,337	21,033	73,284	3,611	1,614,923	1,792,502	90.09%
October	4,137	3,675	67	7,879	4,462	6,505	5,973	3	16,943	24,822	16,203	15,607	21,321	53,131	14,300	3,069	482	4,784	22,635	77,953	2,187	1,617,107	1,793,870	90.15%
November	2,716	4,259	44	7,019	4,024	5,497	4,911	1	14,433	21,452	10,525	8,333	15,093	33,951	12,953	2,964	367	5,289	21,573	55,403	-121	1,616,986	1,793,870	90.14%
December	2,221	2,199	69	4,489	4,632	4,746	4,721	1	14,100	18,589	16,241	13,969	16,335	46,545	12,897	3,031	392	3,728	20,048	65,134	-1,459	1,615,527	1,793,870	90.06%
YTD Total	**46,385**	**28,184**	**1,659**	**76,228**	**71,811**	**106,949**	**56,903**	**20**	**235,683**	**311,911**	**182,893**	**204,300**	**210,178**	**597,371**	**144,530**	**27,148**	**5,513**	**83,316**	**260,507**	**909,282**	**51,404**	**1,615,527**	**1,793,870**	**90.06%**

[1] Enrollments via data sharing between the IOUs.
[2] Enrollments via data sharing between departments and/or programs within the utility.
[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.
[4] No response includes no response to both Recertification and Verification.

PY 2018 CARE Annual Report

CARE Table 3A

Post-Enrollment Verification Results (Model) 2018

SOUTHERN CALIFORNIA GAS COMPANY

Month	Total CARE Households Enrolled	Households Requested to Verify[1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)[2]	Total Households De-enrolled[3]	% De-enrolled through Post Enrollment Verification[4]	% of Total CARE Households De-enrolled
January	1,565,982	3,479	0.22%	1,909	237	2,146	61.68%	0.14%
February	1,568,876	4,147	0.26%	2,345	282	2,627	63.35%	0.17%
March	1,579,342	3,998	0.25%	2,245	215	2,460	61.53%	0.16%
April	1,584,655	5,614	0.35%	3,499	328	3,827	68.17%	0.24%
May	1,597,859	5,466	0.34%	3,496	315	3,811	69.72%	0.24%
June	1,606,015	5,063	0.32%	3,230	341	3,571	70.53%	0.22%
July	1,608,407	5,241	0.33%	3,285	362	3,647	69.59%	0.23%
August	1,611,312	5,371	0.33%	3,185	366	3,551	66.11%	0.22%
September	1,614,923	5,143	0.32%	3,066	325	3,391	65.93%	0.21%
October	1,617,107	5,091	0.31%	2,992	291	3,283	64.49%	0.20%
November	1,616,986	4,348	0.27%	2,572	247	2,819	64.83%	0.17%
December	1,615,527	3,429	0.21%	1,426	160	1,586	46.25%	0.10%
YTD Total	**1,615,527**	**56,390**	**3.49%**	**33,250**	**3,469**	**36,719**	**65.12%**	**2.27%**

[1] Includes all customers who failed SoCalGas' CARE eligibility probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated and the verification process allows customers 90 days (3 or 4 bill cycles) to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)

PY 2018

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) [2]	Total Households De-enrolled [3]	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
YTD Total	**0**	**0**	**0.00%**	**0**	**0**	**0**	**0.00%**	**0.00%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

	A	B	C	D	E	F	G
1	**PY 2018 CARE Annual Report**						
2	**CARE Table 4**						
3	**CARE Self-Certification and Self-Recertification Applications [1]**						
4	**SOUTHERN CALIFORNIA GAS COMPANY**						
5		**Provided [2]**	**Received**	**Approved [3]**	**Denied [4]**	**Pending/Never Completed [5]**	**Duplicates [6]**
6	**Total (Y-T-D)**	6,223,519	702,191	519,652	73,750	30,852	77,937
7	**Percentage**		100.00%	74.00%	10.50%	4.39%	11.10%
8							
9	[1] Includes sub-metered customers.						
10	[2] An estimated number that includes customers whom were provided with CARE self-certification and self-recertification application via direct mail, email, phone, bill insert, door-to-door delivery, utility personnel, and through outreach events.						
11	[3] Approved includes customers who are approved through mail-in, via web, by phone, and through duplicated applications.						
12	[4] Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence.						
13	[5] Pending/Never Completed includes opt-outs, closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers.						
14	[6] Duplicates are customers who are already enrolled in CARE and mail in another CARE application. SoCalGas treats them as recertification applications.						

PY 2018 CARE Annual Report

CARE Table 5

CARE Enrollment by County

SOUTHERN CALIFORNIA GAS COMPANY

County	Estimated Eligible			Total Participants			Penetration Rate		
	Urban	Rural [1]	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	11,016	12	11,028	11,138	18	11,156	101.11%	145.78%	101.16%
Imperial	0	16,418	16,418	1	15,081	15,082	N/A	91.86%	91.86%
Kern	12,611	28,990	41,601	12,099	29,068	41,167	95.94%	100.27%	98.96%
Kings	10	12,566	12,575	16	14,658	14,674	167.97%	116.65%	116.69%
Los Angeles	931,482	3,093	934,575	839,979	1,111	841,090	90.18%	35.91%	90.00%
Orange	193,513	24	193,538	155,499	18	155,517	80.36%	73.85%	80.35%
Riverside	106,618	130,319	236,937	94,557	120,550	215,107	88.69%	92.50%	90.79%
San Bernardino	168,269	1,025	169,295	168,578	855	169,433	100.18%	83.41%	100.08%
San Luis Obispo	7,849	14,367	22,216	3,547	10,958	14,505	45.19%	76.27%	65.29%
Santa Barbara	36,222	1,150	37,372	27,494	562	28,056	75.90%	48.88%	75.07%
Tulare	11,496	46,608	58,104	12,100	48,915	61,015	105.25%	104.95%	105.01%
Ventura	57,949	2,261	60,210	47,202	1,523	48,725	81.45%	67.36%	80.92%
Total	**1,537,037**	**256,834**	**1,793,870**	**1,372,210**	**243,317**	**1,615,527**	**89.28%**	**94.74%**	**90.06%**

[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

	A	B	C	D	E	F	G	H
1	**PY 2018 CARE Annual Report**							
2	**CARE Table 6**							
3	**CARE Recertification Results**							
4	**SOUTHERN CALIFORNIA GAS COMPANY**							
5		**Total CARE Households**	**Households Requested to Recertify [1]**	**% of Households Total (C/B)**	**Households Recertified [2]**	**Households De-enrolled [3]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
6	January	1,565,982	37,134	2.4%	26,265	13,853	70.73%	0.88%
7	February	1,568,876	35,608	2.3%	24,735	13,155	69.46%	0.84%
8	March	1,579,342	31,777	2.0%	20,717	13,137	65.19%	0.83%
9	April	1,584,655	33,160	2.1%	21,155	14,082	63.80%	0.89%
10	May	1,597,859	31,101	1.9%	20,071	12,844	64.53%	0.80%
11	June	1,606,015	37,743	2.4%	24,684	16,196	65.40%	1.01%
12	July	1,608,407	34,023	2.1%	22,793	13,887	66.99%	0.86%
13	August	1,611,312	34,476	2.1%	21,870	14,781	63.44%	0.92%
14	September	1,614,923	28,900	1.8%	17,818	12,444	61.65%	0.77%
15	October	1,617,107	41,593	2.6%	24,882	19,041	59.82%	1.18%
16	November	1,616,986	26,541	1.6%	15,658	11,519	59.00%	0.71%
17	December	1,615,527	26,283	1.6%	15,813	8,196	60.16%	0.51%
18	**YTD**	**1,615,527**	**398,339**	**24.66%**	**256,461**	**163,135**	**64.38%**	**10.10%**
19								
20	[1] Excludes count of customers recertified through the probability model.							
21	[2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.							
22	[3] Includes customers who did not respond or who requested to be de-enrolled.							
23	[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.							

	A	B	C	D	E	F	G	H	I
1	**PY 2018 CARE Annual Report**								
2	**CARE Table 7**								
3	**CARE Capitation Contractors**								
4	**SOUTHERN CALIFORNIA GAS COMPANY**								
5	**Contractor Name [1]**	**Contractor Type (Check one or more if applicable)**				**Enrollments [2]**			**Total Expenditures**
6		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Rural**	**Urban**	**Total**	
7	Community Action Partnership of Orange County		X	X	X	0	0	0	$ -
8	ELA Communications Energy ED Program		X			0	0	0	$ -
9	PACE – Pacific Asian Consortium in Employment		X	X	X	0	0	0	$ -
10	Proteus, Inc.		X			0	0	0	$ -
11	Community Pantry of Hemet		X			0	0	0	$ -
12	Community Action Partnership of San Bernardino		X		X	0	0	0	$ -
13	LA Works		X			0	0	0	$ -
14	Children's Hospital of Orange County		X			0	0	0	$ -
15	All Peoples Christian Center		X			0	0	0	$ -
16	LA County 211		X			0	0	0	$ -
17	YMCA Montebello-Commerce		X			0	0	0	$ -
18	Sr. Citizens Emergency Fund I.V., Inc.		X			0	0	0	$ -
19	Coachella Valley Housing Coalition		X			0	0	0	$ -
20	HABBM		X			0	0	0	$ -
21	Second Harvest Food Bank of Orange County		X			0	0	0	$ -
22	Southeast Community Development Corp.		X			0	0	0	$ -
23	Latino Resource Organization		X			0	0	0	$ -
24	Independent Living Center of Southern California		X			0	0	0	$ -
25	Community Action Partnership - Kern County		X			0	0	0	$ -
26	El Concilio del Condado de Ventura		X			0	0	0	$ -
27	Ventura Cty Comm Human		X			0	0	0	$ -
28	Blessed Sacrament Church		X			0	0	0	$ -
29	Asian-American Resource Center		X			0	0	0	$ -
30	Hermandad Mexicana		X			0	0	0	$ -
31	CSET		X			0	0	0	$ -
32	Crest Forest Family and Community Service		X			0	0	0	$ -
33	CUI – Campesinos Unidos, Inc.		X	X	X	0	0	0	$ -
34	Veterans in Community Service		X	X	X	0	0	0	$ -
35	Chinatown Service Center		X			0	0	0	$ -
36	Koreatown Youth and Community Center		X			0	1	1	$ 20
37	MEND		X			0	0	0	$ -
38	Armenian Relief Society		X			0	0	0	$ -
39	Catholic Charities of LA – Brownson House		X			0	0	0	$ -
40	Delhi Center		X			0	16	16	$ 320
41	OCCC, Inc. (Orange County Community Center)		X			0	0	0	$ -
42	Green Light Shipping	X				0	0	0	$ -
43	APAC Service Center		X			0	3	3	$ 60
44	Visalia Emergency Aid Council		X			0	0	0	$ -
45	**Total Enrollments and Expenditures**					**0**	**20**	**20**	**$ 400**
46									
47	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
48	[2] Enrollments reflect new enrollments only.								

	A	B	C	D	E	F	G	H
1	**PY 2018 CARE Annual Report**							
2	**CARE Table 8**							
3	**CARE Participants as of Month-End**							
4	**SOUTHERN CALIFORNIA GAS COMPANY**							
5		**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Penetration Rate**	**% Change [1, 2]**
6	**January**	N/A	1,565,982	N/A	1,565,982	1,789,906	87.49%	0.12%
7	**February**	N/A	1,568,876	N/A	1,568,876	1,789,906	87.65%	0.18%
8	**March**	N/A	1,579,342	N/A	1,579,342	1,789,906	88.24%	0.66%
9	**April**	N/A	1,584,655	N/A	1,584,655	1,793,233	88.37%	0.34%
10	**May**	N/A	1,597,859	N/A	1,597,859	1,793,233	89.10%	0.83%
11	**June**	N/A	1,606,015	N/A	1,606,015	1,793,233	89.56%	0.51%
12	**July**	N/A	1,608,407	N/A	1,608,407	1,792,502	89.73%	0.15%
13	**August**	N/A	1,611,312	N/A	1,611,312	1,792,502	89.89%	0.18%
14	**September**	N/A	1,614,923	N/A	1,614,923	1,792,502	90.09%	0.22%
15	**October**	N/A	1,617,107	N/A	1,617,107	1,793,870	90.15%	0.14%
16	**November**	N/A	1,616,986	N/A	1,616,986	1,793,870	90.14%	-0.01%
17	**December**	N/A	1,615,527	N/A	1,615,527	1,793,870	90.06%	-0.09%
18								
19	[1] Explain any monthly variance of 5% or more in the number of participants.							
20	[2] The SoCalGas population did not vary by a level of 5% or more in any month during 2018.							

	A	B	C	D
1	**PY 2018 CARE Annual Report**			
2	**CARE Table 9**			
3	**CARE Average Monthly Usage & Bill**			
4	**SOUTHERN CALIFORNIA GAS COMPANY**			
5	**Average Monthly Gas / Electric Usage**			
6	**Residential Non-CARE vs. CARE Customers**			
7	**Customer**	**Gas Therms**	**Gas Therms**	**Total**
8		**Tier 1**	**Tier 2**	
9	Non-CARE	25.20	9.13	**34.33**
10	CARE	20.95	4.81	**25.76**
11	**Customer**	**Electric KWh**	**Electric KWh**	**Total**
12		**Tier 1**	**Tier 2 and Above**	
13	Non-CARE	N/A	N/A	**N/A**
14	CARE	N/A	N/A	**N/A**
15				
16				
17	**Average Monthly Gas / Electric Bill**			
18	**Residential Non-CARE vs. CARE Customers[1]**			
19	**(Dollars per Customer)**			
20	**Customer**	**Gas**	**Electric**	
21	Non-CARE	$37.51	N/A	
22	CARE	$28.68	N/A	
23				
24	[1] Excludes master-meter usage.			

	A	B	C	D	E	F
1	**PY 2018 CARE Annual Report**					
2	**CARE Table 10**					
3	**CARE Surcharge & Revenue**					
4	**SOUTHERN CALIFORNIA GAS COMPANY**					
5	**Electric**					
6	**CARE Surcharge and Revenue Collected by Customer Class**					
7	**Class**	**CARE Surcharge**	**Monthly Bill**	**Bill**	**Collected**	**Revenue Collected**
8	Residential	N/A	N/A	N/A	N/A	N/A
9	Commercial	N/A	N/A	N/A	N/A	N/A
10	Agricultural	N/A	N/A	N/A	N/A	N/A
11	Large/Indust	N/A	N/A	N/A	N/A	N/A
12						
13						
14						
15	**GAS**					
16	**CARE Surcharge and Revenue Collected by Customer Class**					
17				**CARE**	**Total CARE**	**Percentage of**
18	**Customer**	**Average Monthly**		**Surcharge**	**Surcharge**	**CARE Surcharge**
19	**Class**	**CARE Surcharge[1]**	**Monthly Bill**	**Bill**	**Collected**	**Revenue Collected**
20	Residential	$0.83	$37.51	2.21%	$40,116,894	40.86%
21	Commercial	$11.22	$246.95	4.54%	$25,245,605	25.71%
22	Natural Gas Vehicle	$667.00	$7,966.65	8.37%	$3,675,859	3.74%
23	Industrial	$149.92	$874.39	17.15%	$29,144,795	29.68%
24						
25	[1] Excludes CARE customers.					

	A	B	C	D	E	F
1	**PY 2018 CARE Annual Report**					
2	**CARE Table 11**					
3	**CARE Capitation Applications [1]**					
4	**SOUTHERN CALIFORNIA GAS COMPANY**					
5	**Entity**	**Total Received**	**Approved [2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**
6	Orange County CDC	0	0	0	0	0
7	ELA Communications	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Proteus	0	0	0	0	0
10	Cmty Pantry of Hemet	0	0	0	0	0
11	Cmty Svcs SBDO County	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	New Beginning Outrch Inc	0	0	0	0	0
14	Sr Citizen Emergency Fund	0	0	0	0	0
15	HABBM	0	0	0	0	0
16	2nd Harvest Food Bank OC	0	0	0	0	0
17	Latino Resrce Organizatn	0	0	0	0	0
18	Indepnt Living Center So Cal.	0	0	0	0	0
19	SoEast Comm Dev Corp	0	0	0	0	0
20	El Concilio - Ventura	0	0	0	0	0
21	Blessed Sacrament Church	0	0	0	0	0
22	Hermandad Mexicana	0	0	0	0	0
23	Crest Forest Family Cmty	0	0	0	0	0
24	Campesinos Unidos, Inc.	0	0	0	0	0
25	Chinatown Svce Center	0	0	0	0	0
26	Meet Ea Need W / Dignity	0	0	0	0	0
27	Armenian Relief Society	0	0	0	0	0
28	Cath Char Bronson House	0	0	0	0	0
29	CSET	0	0	0	0	0
30	Orange County Comm Ctr (OCCC)	0	0	0	0	0
31	Delhi Center	19	16	0	0	3
32	Koreatown Youth and Comm Ctr	1	1	0	0	0
33	Apac Service Center	12	3	0	0	9
34	Visalia Emergency Aid Council	0	0	0	0	0
35	The Companion Line	0	0	0	0	0
36	Across Amer Foun	0	0	0	0	0
37	All Peoples Christian	0	0	0	0	0
38	LA Works	0	0	0	0	0
39	LA County 211	0	0	0	0	0
40	Coachella Valley Housing Coalition	0	0	0	0	0
41	**Total**	**32**	**20**	**0**	**0**	**12**
42						
43	[1] Includes sub-metered customers.					
44	[2] Includes new enrollments and recertification applications approved.					

PY 2018 CARE Annual Report

CARE Table 12

CARE Expansion Program

SOUTHERN CALIFORNIA GAS COMPANY
Participating Facilities by Month

2018	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	20	1,118	1,138	N/A	N/A	N/A
February	20	1,112	1,132	N/A	N/A	N/A
March	20	1,061	1,081	N/A	N/A	N/A
April	20	1,053	1,073	N/A	N/A	N/A
May	20	1,049	1,069	N/A	N/A	N/A
June	20	1,050	1,070	N/A	N/A	N/A
July	20	1,047	1,067	N/A	N/A	N/A
August	20	1,045	1,065	N/A	N/A	N/A
September	20	1,077	1,097	N/A	N/A	N/A
October	20	1,123	1,143	N/A	N/A	N/A
November	20	1,178	1,198	N/A	N/A	N/A
December	20	1,182	1,202	N/A	N/A	N/A

Average Monthly Gas / Electric Usage[1]

Customer	Gas	Electric
	Therms	KWh
Residential Facilities	25.76	N/A
Commercial Facilities	186.90	N/A

CARE Expansion Self-Certification and Self-Recertification Applications

	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	1,152	1,137	0	15	0
Percentage		98.70%	0.00%	1.30%	0.00%

[1] Excludes master meter usage.

	A	B	C	D	E	F	G	H	I	J
1	**PY 2018 CARE Annual Report**									
2	**CARE Table 13**									
3	**CARE High Usage Verification Results [5]**									
4	**SOUTHERN CALIFORNIA GAS COMPANY**									
5	**Stage 1 - IRS Documentation and ESA Agreement**				**Stage 2 - ESA Participation**			**Stage 3 - Usage Monitoring**		
6	**Households Requested to Verify**	**Removed (No Response)**	**Removed (Verified Ineligible) [1]**	**Income Verified and Referred to ESA**	**Failed and Removed [2]**	**Ineligible [3]**	**Completed**	**Removed [4]**	**Appeals Denied**	**Appeals Approved**
7	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
8										
9	[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
10	[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
11	[3] Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
13	[5] High usage is defined as a customer that exceeds 400% or 600% of baseline.									

PY 2018 CARE Annual Report

CARE Table 13A

CARE Customer Usage and ESA Program Treatment

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV [1]	Percent of those CARE customers Not served by ESA Program [2]	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

[1] Those CARE customers who have been on CARE reate at the same meter for a least six years.

[2] Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.

	A	B
1	**PY 2018 CARE Annual Report**	
2	**CARE Table 14**	
3	**Categorical Enrollment**	
4	**SOUTHERN CALIFORNIA GAS COMPANY**	
5	**Type of Enrollment**	**Number of Customer Enrollments [1]**
6	Bureau of Indian Affairs General Assistance	135
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	68,608
8	CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	16,030
9	Head Start Income Eligible - (Tribal Only)	689
10	Healthy Families A&B	26,456
11	Low-income Home Energy Assistance Program (LIHEAP)	7,940
12	Medicaid/Medi-Cal	127,765
13	National School Lunch Program (NSLP) - Free Lunch	27,567
14	Supplemental Security Income (SSI)	21,953
15	Tribal TANF [2]	n/a
16	Women, Infants, and Children Program (WIC)	34,076
17		
18	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
19	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	