

**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.

And Related Matters.

Application 14-11-007
(Filed November 18, 2014)

Application 14-11-009
Application 14-11-010
Application 14-11-011

**MONTHLY REPORT OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) ON
LOW-INCOME ASSISTANCE PROGRAMS FOR JANUARY 2020**

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Southern California Gas Company
Energy Savings Assistance Program (ESA Program)
And
California Alternate Rates for Energy (CARE)
Program Monthly Report

LOW-INCOME ASSISTANCE PROGRAMS MONTHLY REPORT

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

1.1. Energy Savings Assistance (ESA) Program Overview

1.1.1. Provide a summary of the Energy Savings Assistance Program elements as approved in Decision (D.)16-11-022 and D.17-12-009:

SoCalGas submitted its Mid-Cycle Advice Letter No. (AL) 5325 on July 16, 2018, which was approved by Energy Division (ED) with modifications on December 19, 2018. This report reflects the approved budget, homes treated and therms saved updates per the disposition of AL 5325.

Program Summary through January 2020			
	Authorized / Planning Assumptions*	Actual to Date	%
Budget	\$231,913,662	\$236,302	0.10%
Homes Treated	191,186	0	0.00%
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved**	6,530,000	0	0.00%

* Annual budget, homes treated goals and therms saved targets approved in Disposition of Advice Letter 5325.

** As of September 2019, ex-ante values from the 2015-2017 Impact Evaluation Report are being used to calculate therm savings. These updated values have resulted in a significant reduction in SoCalGas' reported therm savings.

In January 2020, SoCalGas processed and paid contractor invoices related to work performed in 2019 and this activity will be reflected in SoCalGas' Annual Report for the Program Year (PY) 2019 due May 1, 2020.

1.2. Energy Savings Assistance Program Customer Outreach and Enrollment Update.

1.2.1. Provide a summary of the Energy Savings Assistance Program outreach and enrollment strategies deployed this month.

Ethnic and Mass Media Campaign

SoCalGas launched a multi-channel targeted mass media campaign during the month of October 2019. The campaign's objective was to increase awareness among eligible customers and reduce barriers to participation, such as trust. The campaign included a mix of broad channels and targeted strategies to generate awareness, provide education, and drive actions to the program landing page. The channel mix was broken down into television, radio, and digital such as video, display, social and native platforms. The campaign tag line, "Your home deserves upgrades. You deserve savings", speaks to the connection a family has to their home while also explaining how the upgrades available through the ESA Program can help them save money. The campaign ran until mid-December 2019. Results will be reported in March 2020.

E- Newsletter

SoCalGas did not participate in any E-newsletter campaigns related to the ESA Program during the month of January.

Energy Savings Assistance Program - Emails

During the month of January, SoCalGas sent 11,632 emails for customer lists covering eleven specific targeted geographic areas as part of AL 5256 (Clear Plan). The Clear Plan targets customers that have not previously participated in

the ESA Program and have been identified as highly eligible. The email featured ESA Program information and included the contact information of the customer's assigned contractor. Providing the contractor's contact information creates context and instills confidence for the customer as they are more likely to be familiar with the name and have assurance of legitimacy when the contractor calls. Emails were sent based on zip codes to accurately reflect contractor assignments.

Energy Saving Assistance Program - Direct Mailings

In January, in conjunction with the email efforts above, SoCalGas sent 23,763 direct mailers for eleven different customer lists covering targeted geographic areas as part of the Clear Plan. Much like the email campaign, the direct mailers targeted customers who have not previously participated in the ESA Program. The direct mailers featured ESA Program messaging and the contact information of their assigned contractors. Customers are directed to contact their contractor for more information and to enroll into the program. SoCalGas will continue to coordinate with contractors to schedule distribution of marketing materials in order for them to be prepared when customers call.

Energy Savings Assistance Program – Text Messaging

In January, SoCalGas sent 16,226 text messages to customers for eleven different customer lists covering targeted geographic areas as part of the Clear Plan. The text messages prompt customers to reply if they want to receive more

information; 786 customers replied. Once a customer responds, an automated text is sent with the customer's assigned contractor information so the customer can contact the contractor directly.

Energy Savings Assistance Program - Outbound Dialing

SoCalGas did not deploy an outbound dialing campaign during the month of January. Future deployments are being explored and will be considered for incorporation into future marketing strategies for program year (PY) 2020.

Energy Savings Assistance Program - Web Activities

There were 236 internet-generated leads for the ESA Program during the month of January from all channel activities. SoCalGas posted to Facebook, in both English and Spanish, promoting the ESA Program to five targeted zip codes with low program penetration. The Facebook English post reached 22,656 customers, generated 23,670 impressions and 15 clicks to the URL with a cost of \$2.67 per click. The Spanish post reached 22,152 customers, generated 22,635 impressions and 41 clicks with a cost of \$0.98 per click.

1.2.2. Customer Assistance Events and Public Affairs/Public Relations Activities for the CARE and ESA Program.

SoCalGas provides customer program information regarding its interactions with the community that facilitates participation in its Low-Income Programs. On an ongoing basis, SoCalGas Regional Public Affairs meets with various community groups – both the general population and low-income customers. CARE and ESA

Program information is distributed at the events that SoCalGas or its representatives attend. In addition to the ongoing and general outreach in the community, the events listed below represent specific outreach events that SoCalGas participated in during the month of January¹. Please see section 2.2.1 below for additional information on the various community organizations listed.

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
January 3 (Food Bank of Santa Barbara)	Riverview Brown Bag	Guadalupe	Community Based Organization (CBO) staff provided information regarding SoCalGas' Customer Assistance Programs (CAP). CAP materials were distributed to approximately 50 in attendance.
January 5 (HSA-LA)	Census Fiesta	Long Beach	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 24 in attendance.
January 6 (LA 211)	Consulate General of Mexico Resource Fair	Los Angeles	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 150 of 250 in attendance.
January 6 (HSA-LA)	South Gate Farmer's Market Resource Table	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 19 in attendance.
January 7	Mountain View Resident Forum #2- Mobile Home Park Utility Upgrade Pilot Program	San Bernardino	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 60 in attendance.

¹ Although the City of Long Beach is not part of SoCalGas' territory, participation in certain Long Beach events is important as they attract participants from many other nearby SoCalGas communities.

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
January 7 (MICOP)	Radio Outreach	MICOP Radio Indigena 94.1 FM	CBO staff recorded radio show providing information on SoCalGas' Customer Assistance Programs, how to obtain applications, and where to receive information on assistance with the application completion process.
January 8 (HSA-LA)	Huntington Park Farmer's Market Resource Table	Huntington Park	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 20 in attendance.
January 8 (LA 211)	Human Relations Commission Presentation	Long Beach	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 12 in attendance.
January 8 (Food Bank of Santa Barbara)	DeWess Brown Bag	Lompoc	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 40 in attendance.
January 8 (Food Bank of Santa Barbara)	Alma Cena Sana	Lompoc	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 40 in attendance.
January 9 (Food Bank of Santa Barbara)	Storyteller State Street FLIP	Santa Barbara	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 28 in attendance.
January 9 (Food Bank of Santa Barbara)	Storyteller De La Vina	Santa Barbara	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 28 in attendance.
January 9 (MICOP)	Outreach in Ocean View – Olds Road	Oxnard	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 20 in attendance.
January 10 (HSA-LA)	Census Presentation	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 18 in attendance.
January 11 (SCRS-IL)	Alhambra Family Wellness Faire	Alhambra	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 100 in attendance.

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
January 11 (MICOP)	Grand Opening of Ventura County Family Justice Center	Ventura	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 15 in attendance.
January 13 (HSA-LA)	Census Presentation	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to 3 in attendance.
January 13 (HSA-LA)	South Gate Farmer's Market Resource Table	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 20 in attendance.
January 14 (MICOP)	Radio Outreach	MICOP Radio Indigena 94.1 FM	CBO staff recorded radio show providing information on SoCalGas' Customer Assistance Programs, how to obtain applications, and where to receive information on assistance with the application completion process.
January 14	Sycamore Villa Resident Forum – Mobile Home Park Utility Upgrade Pilot Program	Rancho Cucamonga	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 47 in attendance.
January 15	Norwalk Mobile Lodge Resident Forum – Mobile Home Park Utility Upgrade Pilot Program	Norwalk	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 57 in attendance.
January 15 (HSA-LA)	Huntington Park Farmer's Market Resource Fair	Huntington Park	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 13 in attendance.
January 16 (MICOP)	MICOP Office Event	Oxnard	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to 2 in attendance.
January 17 (HSA-LA)	Census Presentation	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 15 in attendance.

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
January 17 (HSA-LA)	Census Presentation	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 5 in attendance.
January 18	37 th Annual MLK Jr. Celebration	Inglewood	SoCalGas event staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 400 in attendance.
January 18-19	2020 Asian American Expo	Pomona	SoCalGas event staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 750 in attendance.
January 21 (MICOP)	Radio Outreach	MICOP Radio Indigena 94.1 FM	CBO staff recorded radio show providing information on SoCalGas' Customer Assistance Programs, how to obtain applications, and where to receive information on assistance with the application completion process.
January 22 (HSA-LA)	Huntington Park Farmer's Market Resource Table	Huntington Park	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 10 in attendance.
January 22 (HSA-LA)	Southeast Rio YMCA Outreach Event	Maywood	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 40 in attendance.
January 22 (Food Bank of Santa Barbara)	Alma Cena Sana	Lompoc	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 25 in attendance.
January 22 (SCRS-IL)	South Central Los Angeles Regional Center Outreach Event	Los Angeles	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 300 in attendance.
January 22 (Food Bank of Santa Barbara)	Kellogg Elementary KFM	Goleta	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 45 in attendance.
January 22 (Food Bank of Santa Barbara)	Brandon Elementary KFM	Goleta	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 60 in attendance.

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
January 23 (LA 211)	Southern California Edison Resource Fair and Presentation	San Gabriel	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 10 in attendance.
January 23	Tabling Day at Mexican Consulate	Los Angeles	Customer Assistance Programs outreach Staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 20 in attendance.
January 23 (MICOP)	Thursday Farmer's Market at Plaza Park	Oxnard	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 25 in attendance.
January 24 (SCRS-IL)	El Rancho High School Information Booth	Pico Rivera	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 25 in attendance.
January 24 - 26	UVSA Tet Festival	Westminster	SoCalGas event staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 650 in attendance.
January 25	99.5 FM KKLA Heath Fair	Pasadena	SoCalGas event staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 525 in attendance.
January 25-26	Lunar New Year Festival	Riverside	SoCalGas event staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 400 in attendance.
January 26 (LA 211)	3 rd Annual Education & Family Resource Fair	San Gabriel	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 125 of 400 in attendance.
January 27 (HSA-LA)	South Gate Farmer's Market Resource Table	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 8 in attendance.
January 28	Rancho Del Sol Resident Forum – Mobile Home	Yucaipa	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Customer Assistance Programs. CAP

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
	Park Utility Upgrade Pilot Program		materials were distributed to approximately 49 in attendance.
January 28 (MICOP)	Radio Outreach	MICOP Radio Indigena 94.1 FM	CBO staff recorded radio show providing information on SoCalGas' Customer Assistance Programs, how to obtain applications, and where to receive information on assistance with the application completion process.
January 28 (MICOP)	Bard Library Outreach Event	Oxnard	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to 3 in attendance.
January 29 (LA 211)	Littlerock High School Back to School Night	Littlerock	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 70 of 100 in attendance.
January 29 (SCRS-IL)	City of South Gate Citizen Advisory Council	South Gate	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 30 in attendance.
January 29	Desert Breeze Resident Forum – Mobile Home Park Utility Upgrade Pilot Program	Rosamond	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 50 in attendance.
January 29	Santa Monica SoCalGas Base Customer Service Field Staff Presentation	Santa Monica	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Energy Savings Assistance program. ESA materials were distributed to approximately 30 in attendance.
January 30	Vogue Mobile Manor Resident Forum – Mobile Home Park Utility Upgrade Pilot Program	Hemet	Customer Assistance Programs outreach staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 50 in attendance.

In August 2019, a pilot program began to evaluate Special Supplemental Nutrition Programs for Women, Infants, and Children (WIC) offices in Los Angeles County. 18 physical applications were received by SoCalGas' operations and of those, three identified WIC as a categorical qualifier. Customer Assistance Programs outreach staff worked with the local district director to provide information on SoCalGas' Customer Assistance Programs and seek assistance and approval to provide information to the clients they serve. Following a brief discussion, approval was provided by the district director. Based on a GAP report, 18 offices were determined to be in underpenetrated areas for both the CARE and ESA Program. Each office was given 150 ESA Program forms, and 150 CARE applications along with a display containing income guidelines and categorical information to be displayed in the resource areas. Talking points were also provided for a quick training of front desk staff. Since WIC is a categorical qualifier, this partnership is a natural fit. Based on an initial test phase, a road map will be created for dissemination to other underpenetrated offices in the rest of Los Angeles County and roll-out to the other 11 counties within SoCalGas' service territory. The pilot ran through December 2019. A summary of the findings will be submitted in the 2019 Annual Report filing. Below is a list of the 18 offices that participated in the preliminary phase:

Culver City 4700 Inglewood Blvd. Culver City, CA 90230	Los Angeles Region 4303 N Figueroa St. Los Angeles, CA 90065	Los Angeles Region 3667 Crenshaw Blvd. Los Angeles, CA 90016	Rosemead 8923 E Mission Dr. Rosemead, CA 91770
Lawndale 15625 Hawthorne Blvd. Lawndale, CA 90260	Los Angeles Region 1801 S La Cienega Blvd. Los Angeles, CA 90035	Los Angeles Region 5940 Santa Monica Blvd. Los Angeles, CA 90038	Cypress 4470 Lincoln Ave. Cypress, CA 90630

San Pedro 312 N Gaffey St. San Pedro, CA 90731	Los Angeles Region 4214 Beverly Blvd. Los Angeles, CA 90004	City of Industry 15942 Amar Rd. City of Industry, CA 91744	La Habra 131 S Harbor Blvd. La Habra, CA 90631
Torrance 1640 W Carson St. Torrance, CA 90501	Los Angeles Region 4100 W. Pico Blvd. Los Angeles, CA 90019	La Puente 417 S Azusa Ave. La Puente, CA 91744	La Mirada 14539 Telegraph Rd. La Mirada, CA 90638
Placentia 618 W Chapman Ave. Placentia, CA 92870	Santa Ana 1701 S Grand Ave. Santa Ana, CA 92705		

1.3. Leveraging Success Evaluation Including CSD

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

SoCalGas continues to explore opportunities to collaborate with various organizations and key stakeholders, including the California Department of Community Services & Development (CSD), to leverage program enrollment. On April 2, 2019, SoCalGas and CSD executed a Low Income Weatherization Program (LIWP) cost reimbursement agreement for installation of qualifying ESA measures to eligible customers.

In 2020, leveraging opportunities with municipalities and water agencies remains a high priority in providing comprehensive energy savings to joint customers, especially for those customers not in a joint IOU service territory. SoCalGas is able to provide administrative and co-funding opportunities for electric and water providers who might otherwise not offer these energy savings measures.

Water leveraging agreements provide the ability for water agencies to capture water savings through the co-funding. Year to date, \$7,285 has been co-funded to support the installation of HE Clothes Washers and other related water measures.

Some water agencies also co-fund low-flow shower heads, faucet aerators, thermostatic shower valves and tub spouts. The participating water agencies include:

- Eastern Municipal Water District
- Fontana Water Company²
- Liberty Utilities, formerly Park Water Company³
- Metropolitan Water District (MWD)
- San Gabriel Valley Water Company⁴
- California American Water
- Moulton Niguel Water District
- Elsinore Valley Municipal Water District
- Western Municipal Water District

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

- Anaheim Public Utilities
- Colton Public Utilities
- Los Angeles Department of Water and Power (LADWP)
- Pasadena Water and Power
- Riverside Public Utilities

² Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.

³ Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.

⁴ 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.

Municipal Electric Provider	Participating Customers
Anaheim Public Utilities	48
Colton Public Utilities	0
LADWP	474
Pasadena Water and Power	15
Riverside Public Utilities	76
Total	613

Providers have reported the activity noted above for 2020 through the month of January. Some of the electric measures installed include LEDs, Smart Power Strips, Torchiere Lamps, A/C Tune-ups, Refrigerator Assessment, Duct Testing & Sealing and Room A/C Replacement. Qualifying measures vary per electric provider and availability of funding.

1.4. Workforce Education & Training

1.4.1. 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 continued its internal training programs which contribute to the goals of workforce development. SoCalGas provides two areas of training: 1) Enrollment and Assessment (E&A); and 2) ESA Field Operations. The year-to-date results are shown in the following tables.

Potential outreach specialists attend a mandatory 3-day E&A training class that reviews the requirements for enrollment, assessment and in-home education. This class also covers utility-specific items related to policies, security processes and

overall customer service standards, as well as leveraging opportunities with other low-income programs. A final exam must be passed for an outreach specialist to be registered and receive a SoCalGas identification badge. Classes are held at SoCalGas' Energy Resource Center located in Downey, California.

SoCalGas Enrollment and Assessment Training		
	January	Total
Attended Class	26	26
Tested	24	24
Passed Class	19	19
Retention Rate*	79%	79%
*Retention Rate is Passed/Tested		

SoCalGas field operations training includes initial individual or group training for new participants in weatherization, inspections, Heating, Ventilation & Air Conditioning (HVAC) and Natural Gas Appliance Testing (NGAT). SoCalGas also provides refresher training primarily to address contractor issues and discuss new measures and procedures that have been implemented into the ESA Program. The class sizes typically range from 5 – 35 technicians. The table below shows the number of students that have attended training classes in 2020.

SoCalGas Field Operations Training				
Class Type	January		YTD Total	
	No. of Classes	No. of Students	No. of Classes	No. of Students
Wx / NGAT Initial	1	4	1	4
HVAC Initial	0	0	0	0
Wx / NGAT Refresher	1	11	1	11
HVAC Refresher	1	10	1	10
Grand Total	3	25	3	25

1.5. Emergency Efforts in Response to D.16-04-040

D.16-04-040 at Ordering Paragraph 10 orders, “Southern California Gas Company and Southern California Edison Company shall track and report on its emergency response efforts immediately on a monthly basis to the Commission’s Energy Division.” This section provides a summary of efforts undertaken in response to D.16-04-040. The current Decision (D.16-11-022), extends this requirement into the current program cycle.

Please refer to ESA Table 2.

2. CARE EXECUTIVE SUMMARY

2.1. CARE Program Summary – December

2.1.1. Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget*	Actual Expenses to Date	% of Budget Spent
Outreach	\$4,004,885	\$154,593	3.86%
Proc., Certification and Verification	\$3,121,351	\$98,559	3.16%
Information Tech./Programming	\$1,037,796	\$27,683	2.67%
Cooling Centers	N/A	N/A	N/A
CHANGES	\$437,502	\$57,177	13.07%
Measurement and Evaluation	\$0	\$0	0%
Regulatory Compliance	\$475,858	\$31,278	6.57%
General Administration	\$953,729	\$46,045	4.83%
CPUC Energy Division Staff	\$60,000	\$5,313	8.86%
Total Expenses	\$10,091,122	\$420,648	4.17%
Subsidies and Benefits	\$135,012,254	\$23,757,281	17.60%
Total Program Costs and Discounts	\$145,103,376	\$24,177,929	16.66%

* Annual budget approved in Resolution G-3532, D.16-11-022 and D.17-12-009.

CARE My Account Activity & Enrollments

In accordance with D.17-12-009, CARE Program enrollment was integrated within My Account in September of 2017, where applications are now processed in real-time. Once logged into My Account, customers receive message center alerts notifying them that they can apply to the CARE Program if they are eligible, or that they are due for recertification or post-enrollment verification (PEV), depending on their CARE status. Customers may then visit a dedicated CARE Program page within My Account where application processes including enrollment, recertification and PEV are available in English and Spanish. CARE customers may also opt-out of the program if they no longer qualify.

This implementation has increased CARE enrollments, reduced manual processing of applications, and improved customer service by providing real-time status updates and application confirmation. Since its inception, there have been 146,789 successful enrollments, 60,187 recertifications, 5,092 post-enrollment verifications and 6,945 opt-outs. Activity for January is as follows:

CARE My Account Activity		
	Transactions	Approved
Self-certification	7,933	6,395
Re-certification	2,665	2,585
PEV	237	148
Customer opt-out	1,469	1,469

CARE CSR Enrollment Initiative

In its PY2015-2017 Application, SoCalGas requested CARE enrollment through Customer Service Representatives (CSRs) when customers call the Customer

Contact Center (CCC) to turn-on or back-on service, or to make payment arrangements. D.16-11-022 was issued on 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.

CSRs began taking CARE applications over the phone at midnight on February 23, 2018.

During the month of January 2020, CSRs successfully enrolled 12,000 customers in CARE. An additional 4,230 customers preferred to receive a CARE application in the mail. Through this effort, CARE enrollment from inception via the CCC is at 297,236 and 126,369 mailed applications.

There have been no issues reported, however, SoCalGas' CARE department will continue to obtain feedback from the CCC regarding this process. Any issues or concerns reported by the CSRs will be reviewed, and where needed, process changes will be implemented to ensure an even greater customer experience.

CARE Recertifications

To encourage recertification onto the CARE Program, SoCalGas mails letters to customers as their recertification date approaches. If the customer does not renew

their certification, SoCalGas mails a second letter. During the month of January, SoCalGas processed a total of 800 on-line renewals.

2.1.2. Please provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants	Penetration rate
1,608,798	1,671,895	96.23%

2.2. Outreach

2.2.1. Discuss utility outreach activities and those undertaken by third parties on the utility’s behalf. (For additional CARE Outreach see section 1.2.2.).

CARE Emails & Enrollments

Due to the increase in the number of customers with an available email address on file, SoCalGas uses email communication whenever possible. SoCalGas also added source codes, to each of the three types of emails it sends to customers, for tracking purposes. During the month of January, SoCalGas sent 8,874 emails to new customers with a probability of being eligible for the CARE program. A total of 40 customers enrolled online and through direct mail. A total of 19,435 emails were sent to existing SoCalGas customers who may qualify for the CARE program and 76 enrolled online. In addition, to recapture those customers that have fallen off CARE, SoCalGas sent 6,134 emails encouraging these customers to reapply and 886 reapplied online.

CARE Third-Party Enrollments & Outreach

SoCalGas employs third-party bilingual (English and Spanish) contractors to canvass targeted neighborhoods to enroll customers on CARE. These canvassers

generated 1,294 approved enrollments in January. In addition to canvassers, CBOs and Faith-Based Organizations (FBOs) constitute a key component of the grassroots tactics. These organizations serve as trusted sources of information on the CARE Program and provide the community with information on enrollment. If a customer is already on the CARE Program, these organizations remind customers to recertify when notified. A partial list of the organizations, the county and community they serve, and the primary focus of these organizations follows.

211 LA County is a multilingual referral phone number for Los Angeles County. As a result of SoCalGas' close working relationship with 211, callers learn about the ESA Program and CARE when they are placed on hold, and representatives are trained to follow up with callers on these programs, even if utility assistance was not the original purpose of the call. The organization provides monthly reporting on the categories of service calls and zip codes of the callers. In addition to operating a crisis-information helpline, 211 also attends community events, and through their relationship with SoCalGas, they discuss low-income programs as part of their outreach. Additional activities are detailed in section 1.2.2. During the month of January, 93 callers were informed about the CARE Program, with 18 interested in the ESA Program.

To assist with grassroots outreach, SoCalGas also works with counselors from Worksite Wellness, a CBO in Los Angeles County that provides outreach to low-income working families. Counselors visit workplaces in south Los Angeles and

neighboring communities to deliver wellness seminars and discuss no-cost/low-cost health care services. While informing workers of Medi-Cal eligibility, the counselors also inform the workers of the CARE Program. In January, Worksite Wellness staff facilitated presentations, and provided health education materials and SoCalGas Customer Assistance Information including CARE, ESA and Medical Baseline to 623 individuals through classes and health fairs. Staff also provided enrollment assistance to 62 families that qualified for Customer Assistance Programs based on Medi-Cal. CBO staff facilitated a presentation and hosted a monthly resource table with information. Staff made weekly visits to South-Central Family Health Centers in Huntington Park, as well as Venice Family Clinic, Maternal and Child Health Center, the Saint Louise Family Resource Center, LA Care Family Resource Center in Lynwood and Downtown LA and Best Start Metro LA Neighborhood Leadership groups. Staff participated in health education classes at Queenscare Clinics in East LA and Central LA, South Central Family Health Center and the Latino Kids Health Center in Montebello.

SoCalGas also collaborates with LIFT-Los Angeles. LIFT partners with community and early childcare organizations who refer parents and caregivers to SoCalGas' services (parents can also contact LIFT directly). While these community institutions are focused on helping children develop and thrive, LIFT concentrates on engaging and supporting their parents. LIFT works to build a strong, trusted relationship with each parent and/or caregiver centering around

family goals that include increasing savings and reducing debt, finding high-quality educational opportunities and securing jobs that can provide more economic stability. Members and coaches meet at least once a month to make progress towards their goals. LIFT also provides families with funds to meet emergency needs and support long-term goals, and connects parents to a broader community of local resources and partnerships such as SoCalGas' Customer Assistance Programs. This month, LIFT worked with their members, providing them with SoCalGas' CAP information.

A partnership with St. Barnabas Foundation in Los Angeles County was formed in 2018 to assist with the growing number of older adults in SoCalGas' service territory who lack basic developmental tools. SoCalGas plans on additional events and program participation throughout the rest of the year.

In Santa Barbara County, SoCalGas continues to work with Unity Shoppe, a CBO that serves low-income families, children, seniors, and persons with disabilities. The store-front facility in downtown Santa Barbara serves approximately 17,000 families per year. Each family meets with a counselor providing an opportunity for one-on-one discussion on SoCalGas' low-income programs. This month Unity Shoppe introduced Customer Assistance Programs to 16 of their partner agencies that work in referrals of low-income clients. Agencies representing schools, infant & children programs, medical assistance programs, and veteran outreach services were on hand. SoCalGas CAP information was distributed, and the agencies were

also provided with information via email that contained links to program applications as well as printed pamphlets. This month the agencies were as follows: ResCare workforce, Franklin Neighborhood Center, CALM Great Begin Programs, Santa Barbara County Education Office, Infant Early Start Carpinteria Health Care Center, Santa Barbara City College, CPES/Novelles, Shira Musicant MFT, Pescadero Lofts Housing Authority of the County of Santa Barbara (HACSB), DSS Benefit Service Center, Westside Neighborhood Center, Santa Barbara Neighborhood Clinic, East Goleta Neighborhood Clinic, Health Promotions, Isla Vista Neighborhood Clinic, and Low Westside Community Center.

Ventura County has a very large population of indigenous speakers (residents who speak neither English nor Spanish, but who speak various indigenous languages, such as Zapoteco or Mixteco). The Mixteco Indigena Community Organizing Project (MICOP) reports that 20,000 indigenous speakers reside in Ventura County. To reach out to these residents and customers - primarily farmworkers and persons with limited English proficiency – SoCalGas collaborates with MICOP to extend awareness of the CARE Program. MICOP provides ongoing awareness, and SoCalGas schedules periodic sponsored events to provide direct outreach.

Also in Ventura County, SoCalGas works with Food Share Ventura County, an organization that provides food for over 75,000 people monthly. Food Share is a

member of Feeding America, the nation's largest hunger-relief network of food banks, as well as the California Association of Food Banks. In the month of January, Food Share Ventura county distributed approximately 3,000 "Senior Kits" with SoCalGas' Customer Assistance Programs materials at various locations throughout Ventura County.

In our Southern Desert region, SoCalGas partners with FIND Food Bank. FIND Food Bank is the Desert's regional food bank and is the only regional food bank serving eastern Riverside and southern San Bernardino Counties. FIND distributes over 12 million pounds of food assistance annually to an average 90,000 individuals each month across the service area. In FY18/19 the amount of food distributed for free to the community was valued at over \$19 million, allowing their clients to redirect their limited dollars towards rent payments to prevent homelessness, medical care to stay healthy and lower stress to help them perform better at school and work. All of which help end cycles of poverty and hunger. FIND operates 22 FIND Mobile Market Distributions and a network of over 66 community-based partners whose programs include food pantries, soup kitchens, after-school and summer care, senior centers, faith-based organizations, and homeless shelters. Through its affiliations with Feeding America and the California Association of Food Banks, FIND represents the Desert Community at regional, state, and national levels to advocate for the most vulnerable populations suffering from food insecurity. For the month of January, FIND Food Bank's partnership with SoCalGas led to 45 one-on-one outreach opportunities to present

SoCalGas' CAP information in four of the 15 coverage areas they serve: Desert Hot Springs, Mecca, Palm Desert and Thermal.

In the Southeast region of Los Angeles County, SoCalGas partners with Southeast Community Development Corporation (SCDC), a non-profit organization addressing the serious social and economic issues existing in the Southeast's eight member cities of Bell, Bell Gardens, Commerce, Cudahy, Huntington Park, Maywood, South Gate, and Vernon. SCDC was created based on the belief that community problems must be solved by the community itself and is committed to utilizing resources within the community. With local funding sources, SCDC has continued to be a strong investment in the communities it serves. SCDC has a history of managing community projects and producing positive results. It has administered bus shuttles for the cities of Montebello and Huntington Park, administered a federally funded home renovation project for the city of Huntington Park, administered a 2000 Census Questionnaire Assistance Center, distributed loans through the Small Business Micro Loan Program, administered a business assistance center, formed a Southeast Health Coalition, and co-sponsored a college scholarship program and college conference fair for students in the Southeast area. The organization has since expanded to the rest of the county and works as a resource in many different areas including education and enrollment of customers into SoCalGas' Customer Assistance Programs. Along with promoting programs at several community events listed in sections above, during the month

of January, SCDC provided one-on-one touchpoints with customers discussing both the ESA and CARE Programs.

Since 1980, Inner City Law Center (ICLC), a non-profit law firm has provided free legal services to the vulnerable residents of Los Angeles. ICLC promotes access to decent, safe, and fully habitable housing for the enormous number of homeless and working-poor families and individuals residing in Los Angeles' inner city neighborhoods. It is the only full-time provider of legal services headquartered on Skid Row, fighting for justice for low-income tenants, working poor families, immigrants, people who are living with HIV/AIDS or are disabled, and veterans. In January, through their partnership with SoCalGas, information regarding SoCalGas' Customer Assistance Programs was distributed to 41 tenants via door knocking activities, tenant's rights presentations, and community fairs. Additionally, new Rent Escrow Account Program (REAP) properties received information during outreach contract visits with the city of Los Angeles. Approximately 30 percent of the tenants visited in January said they already knew about the CARE program; the others had no prior knowledge of the program and said they would look into participating.

CARE Direct Mail Activity & Enrollments

During the month of January, SoCalGas sent 13,603 applications via direct mail to new customers deemed likely to be eligible for the CARE Program. SoCalGas enrolled 40 new customers via direct mail and online onto the CARE Program. To

reach customers who were previously participating in the CARE program, but failed to recertify, SoCalGas sends direct mail informing them to reapply online. SoCalGas mailed 10,201 letters to customers who have failed to renew their CARE eligibility. Additionally, SoCalGas mailed 25,000 letters directing customers who are not on CARE but who have a high probability of being qualified for CARE, to enroll online. As of August 2018, SoCalGas no longer mails paper applications to existing SoCalGas customers not on CARE nor to customers who need to reapply. The updated letters that direct customers to apply online contributed to the 1,541 online enrollments processed in January. These online enrollments are generated when a customer organically searches for and visits the CARE homepage.

CARE Bill Inserts

No bill inserts were deployed during the month of January, but a Customer Assistance message was included on customers' gas bills. SoCalGas approved 742 bill insert applications from prior months in January.

Outreach by Field Employees

Field service employees continue to distribute CAP brochures to customers when entering customer premises. Throughout the year, the CARE Outreach Team has distributed supplemental deliveries to individual bases on an as-requested basis. SoCalGas launched an automated system that allows operating bases to request CAP brochures directly which has continued through the month of January. This

option is in addition to the regular system-wide semi-annual deployment of CAP brochures to operating bases.

CARE Social & Mass Media Campaign

SoCalGas launched a mass media campaign in the month of August. The main campaign objectives were to maintain an above 90% penetration rate, lower monthly attrition levels to less than 55%, and increase the current rate of 30% online enrollments. The target audience were adults, ages 25 to 65 and included messaging in both English and Spanish. The messaging focused on reaching low income residential households who are unemployed, experiencing adverse economic events or are enrolled in other public assistance programs. The strategic media approach focused on a mix of highly targeted channels and tactics that have the ability to proximity target in high opportunity zip codes. Channels include out-of-home and mobile-led digital such as audio, display, social media and search. The campaign ran through October 2019 and results will be reported in February 2020.

Disability

SoCalGas continues to work with organizations in the disability community such as Fiesta Educativa, an organization that focuses on helping Latino families that have family members with special needs. This organization performs disability outreach and community events in Los Angeles, Riverside, San Bernardino, and Orange Counties.

SoCalGas also has an ongoing partnership with Blindness Support Services Inc., an organization that has a specialized history of providing direct program services to individuals who are blind or visually impaired on a one-on-one basis. The organization provides assistance in Riverside and San Bernardino counties and works with individuals who have visual impairments to become more independent and adapt to the challenges they face. The counselors have been trained on the CARE and ESA Programs and have a plan in place to provide outreach and enrollment in SoCalGas' programs. In the month of January, staff provided one-on-one assistance to 47 seniors and individuals with disabilities, providing them with information on SoCalGas' Customer Assistance Programs.

In addition, SoCalGas works with Southern California Resource Services for Independent Living (SCRS-IL). A cross-disability, non-residential, disability rights organization, SCRS-IL empowers people with any disability to live full and independent lives by committing to building an inclusive community that recognizes the dignity, humanity and worth of all people. Through comprehensive Independent Living and Employment Services provided by well-trained staff, the unified center supports people with disabilities to transform their lives through their own choices of how they live, work and participate in their community. SCRS-IL is committed to the founding principles of independent living, self-advocacy and personal empowerment. Along with the activities listed below, SCRS-IL also held meetings at both of their facilities (Pasadena and Downey) and

provided SoCalGas CAP information to over 385 clients and worked with new clients one-on-one in regards to SoCalGas' Customer Assistance Programs.

The events listed below represents SoCalGas' outreach efforts in the disability community for the month of January.

<u>Event Date</u>	<u>Event Name</u>	<u>Event Location</u>	<u>Event Information</u>
January 15 (Blindness Support Services)	Heritage Gardens Assisted Living	San Bernardino County	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 21 attendees.
January 22 (Blindness Support Services)	Lighthouse for the Blind Outreach	San Bernardino	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 55 attendees.
January 23 (Fiesta Educativa)	Fiestas Familiares Self Determination	Pico Rivera	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 7 in attendance.
January 25 (Fiesta Educativa)	Fiestas Familiares Mini Conference – Spanish	Santa Fe Springs	CBO staff provided information regarding SoCalGas' Customer Assistance Programs. CAP materials were distributed to approximately 50 attendees.

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

To maximize new CARE enrollments and to retain customers already participating in CARE, SoCalGas shares customer enrollment information with other utilities such as Southern California Edison (SCE) and San Diego Gas & Electric (SDG&E). During the month of January, 2,214 customers were enrolled in SoCalGas' CARE Program as a result of inter-utility data sharing activities. Additionally, CARE shares data with internal programs such as SoCalGas' ESA Program and the Gas Assistance Fund (GAF). Intra-utility efforts in January

generated 1,524 CARE enrollments. Coordinating the CARE Program with other related low-income programs not only results in supporting program participation rates, it also helps increase PEV activities when customer information is shared with programs such as the Low-Income Home Energy Assistance Program (LIHEAP). Since LIHEAP requires upfront proof of income and is a qualifying Categorically Eligible program, once CARE receives LIHEAP customer data, those customers are considered automatically eligible and their “pre-enrollment verification” is used by SoCalGas to meet CARE’s PEV requirements. There were 80 customers enrolled through leveraging during the month of January.

2.3. CARE Recertification Complaints

There were no recertification complaints in the month of January.

3. APPENDIX: ENERGY SAVINGS ASSISTANCE PROGRAM TABLES AND CARE TABLES

ESA Program - Table 1 - Program Expenses

ESA Program - Table 1A – Unspent Funds

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

ESA Program - Table 2A – Program Expenses – CSD Leveraging

ESA Program – Table 2B – Program Expenses – Multifamily Common Area

ESA Program – Table 2B-1 – Eligible Multifamily Common Area Measures

ESA Program - Table 3A/3B - Average Bill Savings per Treated Home / Common Area

ESA Program - Table 4A/4B/4C – Homes / Buildings Treated

ESA Program - Table 4A-2 - Homes Unwilling/Unable to Participate

ESA Program - Table 5A/5B/5C - Program Customer Summary

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 – Refrigerators, Energy Education and My Account

CARE - Table 1 - CARE Overall Program Expenses

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

CARE - Table 3A - CARE Post-Enrollment Verification Results (Model)

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

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 - Expenditures for Pilot

CARE - Table 10 - CHANGES Individual Customer Assistance

CARE - Table 11 - CHANGES Group Customer Assistance – Reported Monthly

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Energy Savings Assistance Program Table 1 - Energy Savings Assistance Program Expenses												
2	Southern California Gas Company												
3	January 2020												
4													
5		Authorized Budget ¹			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
6	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
7	Energy Efficiency												
8	Appliances	N/A	\$ 18,099,837	\$ 18,099,837	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
9	Domestic Hot Water	N/A	\$ 20,189,371	\$ 20,189,371	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
10	Enclosure	N/A	\$ 33,990,377	\$ 33,990,377	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
11	HVAC ²	N/A	\$ 24,437,294	\$ 24,437,294	N/A	\$ (122)	\$ (122)	N/A	\$ (122)	\$ (122)	N/A	0.00%	0.00%
12	Maintenance	N/A	\$ 2,016,018	\$ 2,016,018	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
13	Lighting	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
14	Miscellaneous	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
15	Customer Enrollment	N/A	\$ 19,379,347	\$ 19,379,347	N/A	\$ 8,005	\$ 8,005	N/A	\$ 8,005	\$ 8,005	N/A	0.04%	0.04%
16	In Home Education	N/A	\$ 3,951,472	\$ 3,951,472	N/A	\$ 137	\$ 137	N/A	\$ 137	\$ 137	N/A	0.00%	0.00%
17	Pilot ³	N/A	\$ -	\$ -	N/A	\$ 30,950	\$ 30,950	N/A	\$ 30,950	\$ 30,950	N/A	0.00%	0.00%
18	Energy Efficiency TOTAL	N/A	\$ 122,063,716	\$ 122,063,716	N/A	\$ 38,969	\$ 38,969	N/A	\$ 38,969	\$ 38,969	N/A	0.03%	0.03%
19													
20	Training Center	N/A	\$ 945,010	\$ 945,010	N/A	\$ 44,787	\$ 44,787	N/A	\$ 44,787	\$ 44,787	N/A	4.74%	4.74%
21	Inspections	N/A	\$ 2,636,480	\$ 2,636,480	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
22	Marketing and Outreach ⁴	N/A	\$ 1,450,000	\$ 1,450,000	N/A	\$ (1,840)	\$ (1,840)	N/A	\$ (1,840)	\$ (1,840)	N/A	-0.13%	-0.13%
23	Statewide Marketing Education and Outreach	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
24	Studies ⁴	N/A	\$ 115,625	\$ 115,625	N/A	\$ (592)	\$ (592)	N/A	\$ (592)	\$ (592)	N/A	-0.51%	-0.51%
25	Regulatory Compliance	N/A	\$ 358,217	\$ 358,217	N/A	\$ 17,633	\$ 17,633	N/A	\$ 17,633	\$ 17,633	N/A	4.92%	4.92%
26	General Administration	N/A	\$ 6,818,403	\$ 6,818,403	N/A	\$ 30,304	\$ 30,304	N/A	\$ 30,304	\$ 30,304	N/A	0.44%	0.44%
27	CPUC Energy Division	N/A	\$ 86,000	\$ 86,000	N/A	\$ 7,970	\$ 7,970	N/A	\$ 7,970	\$ 7,970	N/A	9.27%	9.27%
28													
29	TOTAL PROGRAM COSTS	N/A	\$ 134,473,450	\$ 134,473,450	N/A	\$ 137,232	\$ 137,232	N/A	\$ 137,232	\$ 137,232	N/A	0.10%	0.10%
30	Funded Outside of ESA Program Budget												
31	Indirect Costs				N/A	\$ 328,198	\$ 328,198	N/A	\$ 3,398,813	\$ 3,398,813			
32	NGAT Costs					\$ 382,089	\$ 382,089		\$ 2,105,520	\$ 2,105,520			
33													
34													
35	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,												
36	2018, and Non-Standard Disposition of Midcycle AL 5325, dated December 19, 2018 are not shown on this table but appear on Table 1A.												
37	² Current month credit in HVAC amount due to cash discount.												
38	³ Pilot current year expenditures related to 2019 activity paid and posted in Jan 2020, however total 2017-2020 cycle spend still within overall cycle budget.												
39	⁴ Monthly credit amount due to December 2019 accrual estimate higher than January 2020 actual amount posted.												
40	Note: In January 2020, a manual adjustment was made to exclude a net accrual/reversal debit amount of \$1,987,394 for contractor costs related to all ESA Program measure categories associated to December												
41	2019 activities. This amount will be incorporated in 2019 costs as reported in the SoCalGas' Annual Report filed May 2020.												
42	Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.												

**Energy Savings Assistance Program Table 1A - Energy Savings Assistance Program Expenses Funded From 2009-2016 Unspent ESA Program Funds
Southern California Gas Company
January 2020**

ESA Program:	Authorized Budget			Current Month Expenses			Year to Date Expenses ²			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Appliances	N/A	\$ 3,422,895	\$ 3,422,895	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Domestic Hot Water	N/A	\$ 13,366,922	\$ 13,366,922	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Enclosure	N/A	\$ 20,001,550	\$ 20,001,550	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
HVAC	N/A	\$ 14,241,745	\$ 14,241,745	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Maintenance	N/A	\$ 1,392,325	\$ 1,392,325	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Customer Enrollment	N/A	\$ 18,495,563	\$ 18,495,563	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
In Home Education	N/A	\$ 4,896,366	\$ 4,896,366	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Pilot	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Training Center	N/A	\$ 32,049	\$ 32,049	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Inspections	N/A	\$ 1,168,900	\$ 1,168,900	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Marketing and Outreach	N/A	\$ 500,000	\$ 500,000	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Multi-Family	N/A	\$ 4,500,000	\$ 4,500,000	N/A	\$ 99,070	\$ 99,070	N/A	\$ 99,070	\$ 99,070	N/A	2.20%	2.20%
Leveraging - CSD	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Regulatory Compliance	N/A	\$ 70,147	\$ 70,147	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
General Administration	N/A	\$ 300,000	\$ 300,000	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
TOTAL PROGRAM BUDGET/EXPENSES¹	N/A	\$ 82,388,463	\$ 82,388,463	N/A	\$ 99,070	\$ 99,070	N/A	\$ 99,070	\$ 99,070	N/A	0.12%	0.12%

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.

² Year to date expenses include cost from current year 2020.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

**Energy Savings Assistance Program Table 2A
Southern California Gas Company
January 2020**

Measures	Units	ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh ¹ (Annual)	kW ¹ (Annual)	Therms ¹ (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Home						0.0%
Microwaves ²	Home						0.0%
Refrigerators	Each						0.0%
Freezers	Each						0.0%
Domestic Hot Water							
Other Hot Water ³	Home						0.0%
Tank and Pipe Insulation ⁴	Home						0.0%
Water Heater Repair/Replace	Home						0.0%
Thermostatic Shower Valve	Each						0.0%
New - Combined Showerhead/TSV	Each						0.0%
New - Heat Pump Water Heater	Each						0.0%
Tub Diverter/Spout	Each						0.0%
Enclosure							
Air Sealing / Envelope ⁵	Home						0.0%
Attic Insulation	Home						0.0%
HVAC							
Furnace Repair/Replacement	Home						0.0%
Room A/C Replacement	Home						0.0%
Central A/C replacement	Home						0.0%
Heat Pump Replacement	Home						0.0%
Evaporative Cooler	Home						0.0%
Duct Testing and Sealing	Home						0.0%
Energy Efficient Fan Control A/C Time Delay	Home						0.0%
Prescriptive Duct Sealing	Home						0.0%
High Efficiency Forced Air Unit (HE FAU)	Home						0.0%
New - Blower Motor Retrofit	Home						0.0%
Maintenance							
Furnace Clean and Tune	Home						0.0%
Central A/C Tune up	Home						0.0%
Lighting							
Lighting	Home						0.0%
New - LED Diffuse A-Lamps	Each						0.0%
New - LED Reflector Bulbs (PAR/BR)	Each						0.0%
New - LED Torchieres	Each						0.0%
New - LED Exterior Hardwired Fixtures	Each						0.0%
New - LED Internal Hardwire	Each						0.0%
Miscellaneous							
Pool Pumps	Home						0.0%
Smart Power Strips - Tier 1	Home						0.0%
New - Smart Power Strips - Tier 2	Each						0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home					\$ -	0.0%
In-Home Education	Home					\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Total Households Weatherized ⁶							
CSD MF Tenant Units Treated							
			Total				
- Multi-family							

¹ All savings are calculated based on the following sources:

DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.

² Microwave savings are from ECONorthWest Studies received in December of 2011.

³ Includes Faucet Aerators and Low Flow Showerheads

⁴ Includes Water Heater Blankets and Water Heater Pipe Insulation

⁵ 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.

⁶ Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

Energy Savings Assistance Program Common Area Measures - Table 2B
Southern California Gas Company
January 2020

ESA CAM Measures ^{2,3}	Units	ESA Program - Multifamily Common Area ¹					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh ⁴ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Home	-	-	-	-	\$ -	0.0%
Microwaves ⁵	Home	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Other Hot Water	Home	-	-	-	-	\$ -	0.0%
Tank and Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Home	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valves	Each	-	-	-	-	\$ -	0.0%
New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Tub Diverter/Spout	Each	-	-	-	-	\$ -	0.0%
Water Heater Replace	Each	-	-	-	-	\$ -	0.0%
Boiler Replace	Each	-	-	-	-	\$ -	0.0%
Enclosure							
Air Sealing / Envelope ⁶	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
Furnace Repair/Replacement	Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
Maintenance							
Lighting							
Miscellaneous							
Smart Thermostat	Home	-	-	-	-	\$ -	0.0%
Ancillary Services							
Commissioning ⁷	Home	-	-	-	-	\$ -	0.0%
Audit ⁸	Home	-	-	-	-	\$ -	0.0%
Administration ⁹	Home	-	-	-	-	\$ 6,262	73.9%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home	-	-	-	-	\$ 2,214	26.1%
In-Home Education	Home	-	-	-	-	\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ 8,476	100.0%

Multifamily Properties Treated	Number
Total number of Multifamily Properties Treated ¹⁰	-
Subtotal of Master-metered Multifamily Properties Treated	-
Properties Treated ¹¹	-

ESA Program - Multifamily Common Area	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ 6,262	\$ 6,262
Direct Implementation (Non-Incentive)	\$ -	\$ 2,214	\$ 2,214
Direct Implementation	\$ -	\$ 90,594	\$ 90,594
TOTAL MF CAM COSTS	\$ -	\$ 99,070	\$ 99,070

<<Includes measures costs

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 Measures are customized by each IOU, see 'Table 2B-1, Eligible Measures List'. Measures list may change based on available information on both costs and benefits and may vary across climate zones. Each IOU should fill out Table 2B as it pertains to their program. Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

³ Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.

⁴ All savings are calculated based on the following sources:

DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.

⁵ Microwave savings are from ECONorthWest Studies received in December of 2011.

⁶ 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.

⁷ Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

⁸ Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.

⁹ Per D.17-12-009 at p.213, 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.

¹⁰ Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

¹¹ Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

**Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures List
Southern California Gas Company
January 2020**

Common Area Measures Category and Eligible Measures Title ¹	Effective Date	End Date ²	Eligible Climate Zones ³
Appliances			
High Efficiency Clothes Washer	11/10/2016	N/A	All Climate Zones
Domestic Hot Water			
Water Heater Blanket	11/10/2016	N/A	All Climate Zones
Low Flow Shower Head	11/10/2016	N/A	All Climate Zones
Water Heater Pipe Insulation	11/10/2016	N/A	All Climate Zones
Faucet Aerator	11/10/2016	N/A	All Climate Zones
Water Heater Repair/Replacement	11/10/2016	N/A	All Climate Zones
Thermostatic Shower Valve	11/10/2016	N/A	All Climate Zones
New - Tub Diverter/ Tub Spout	12/14/2017	N/A	All Climate Zones
Large Water Heater Replace	11/10/2016	N/A	All Climate Zones
Boiler Replace	11/10/2016	N/A	All Climate Zones
Envelope			
Air Sealing / Envelope	11/10/2016	N/A	All Climate Zones
Caulking	11/10/2016	N/A	All Climate Zones
Attic Insulation	11/10/2016	N/A	All Climate Zones
HVAC			
FAU Standing Pilot Conversion	11/10/2016	N/A	All Climate Zones
Furnace Repair/Replacement	11/10/2016	N/A	All Climate Zones
New - High Efficiency Forced Air Unit (HE FAU)	11/10/2016	N/A	All Climate Zones
Lighting			
Miscellaneous			
Smart Thermostat	12/19/2018	N/A	All Climate Zones

¹ Measures list may change based on available information on both costs and benefits (including energy benefits as well as non-energy benefits) and may vary across climate zones. This is not a list of installed measures, it is a list of eligible measures.

Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

² Only complete if measure is canceled or discontinued

³ Defined as CEC California Building Climate Zones

https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

	A	B
1	Energy Savings Assistance Program Tables 3A-B	
2	Southern California Gas Company	
3	January 2020	
4		
5	Table 3A-1, ESA Program	
6	Annual kWh Savings	N/A
7	Annual Therm Savings	-
8	Lifecycle kWh Savings	N/A
9	Lifecycle Therm Savings	-
10	Current kWh Rate	N/A
11	Current Therm Rate	\$ -
12	Average 1st Year Bill Savings / Treated Households	\$ -
13	Average Lifecycle Bill Savings / Treated Households	\$ -
14		
15		
16	Table 3A-2, ESA Program - CSD Leveraging	
17	Annual kWh Savings	N/A
18	Annual Therm Savings	-
19	Lifecycle kWh Savings	N/A
20	Lifecycle Therm Savings	-
21	Current kWh Rate	N/A
22	Current Therm Rate	\$ -
23	Average 1st Year Bill Savings / Treated Households	\$ -
24	Average Lifecycle Bill Savings / Treated Households	\$ -
25		
26	Table 3A-3, Summary - ESA Program/CSD Leveraging	
27	Annual kWh Savings	N/A
28	Annual Therm Savings	-
29	Lifecycle kWh Savings	N/A
30	Lifecycle Therm Savings	-
31	Current kWh Rate	N/A
32	Current Therm Rate	\$ -
33	Average 1st Year Bill Savings / Treated Households	\$ -
34	Average Lifecycle Bill Savings / Treated Household	\$ -
35		
36		
37	Table 3B, ESA Program - Multifamily Common Area	
38	Annual kWh Savings	N/A
39	Annual Therm Savings	165,619
40	Lifecycle kWh Savings	N/A
41	Lifecycle Therm Savings	3,312,379
42	Current kWh Rate	N/A
43	Current Therm Rate	\$ -
44	Average 1st Year Bill Savings / Treated Properties	\$ -
45	Average Lifecycle Bill Savings / Treated Properties	\$ -
46		
47	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.	

	A	B	C	D	E	F	G
1	Energy Savings Assistance Program Table 4 - Homes / Buildings Treated						
2	Southern California Gas Company						
3	January 2020						
4	Table 4A-1, ESA Program						
5	Eligible Households			Households Treated YTD			
6	County	Rural	Urban	Total	Rural	Urban	Total
7	Fresno			0	0	0	0
8	Imperial			0	0	0	0
9	Kern			0	0	0	0
10	Kings			0	0	0	0
11	Los Angeles			0	0	0	0
12	Orange			0	0	0	0
13	Riverside			0	0	0	0
14	San Bernardino			0	0	0	0
15	San Luis Obispo			0	0	0	0
16	Santa Barbara			0	0	0	0
17	Tulare			0	0	0	0
18	Ventura			0	0	0	0
19	Total	0	0	0	0	0	0
20							
21							
22	Table 4B, ESA Program - CSD Leveraging						
23				Households Treated YTD			
24	County				Rural	Urban	Total
25	Fresno			0			0
26	Imperial			0			0
27	Kern			0			0
28	Kings			0			0
29	Los Angeles			0			0
30	Orange			0			0
31	Riverside			0			0
32	San Bernardino			0			0
33	San Luis Obispo			0			0
34	Santa Barbara			0			0
35	Tulare			0			0
36	Ventura			0			0
37	Total	0	0	0	0	0	0
38							
39							
40	Table 4C, ESA Program - Multi-Family Common Area						
41				Properties Treated YTD			
42	County				Rural	Urban	Total
43	Fresno			0			0
44	Imperial			0			0
45	Kern			0			0
46	Kings			0			0
47	Los Angeles			0			0
48	Orange			0			0
49	Riverside			0			0
50	San Bernardino			0			0
51	San Luis Obispo			0			0
52	Santa Barbara			0			0
53	Tulare			0			0
54	Ventura			0			0
55	Total	0	0	0	0	0	0
56							
57	[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.						
58	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.						

**Energy Savings Assistance Program Table 4A-2 - Homes Unwilling / Unable to Participate
Southern California Gas Company
January 2020**

ESA Program		Reason Provided					
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
Fresno							
Imperial							
Kern							
Kings							
Los Angeles							
Orange							
Riverside							
San Bernardino							
San Luis Obispo							
Santa Barbara							
Tulare							
Ventura							
Total¹	0	0	0	0	0	0	0

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary																
2	Southern California Gas Company																
3	January 2020																
4	Table 5A, ESA Program																
5			Gas & Electric			Gas Only ¹			Electric Only			Total					
6		# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
7	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
8	January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
9	February	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
10	March	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
11	April	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
12	May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
13	June	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
14	July	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
15	August	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
16	September	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
17	October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
18	November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
19	December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
20	YTD Total	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
21																	
22	¹ As of September 2019, all savings are calculated based on the following source:																
23	DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.																
24	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month in Table 2.																
25	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.																
26																	
27	Table 5B, ESA Program - CSD Leveraging																
28			Gas & Electric			Gas Only			Electric Only			Total					
31		# of Buildings Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
32			Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
33	Month																
34	January																
35	February																
36	March																
37	April																
38	May																
39	June																
40	July																
41	August																
42	September																
43	October																
44	November																
45	December																
46	YTD Total	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
47																	
48	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month in Table 2A.																
49	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.																
50																	
51	Table 5C, ESA Program - Multi-Family Common Area																
52			Gas & Electric			Gas Only			Electric Only			Total					
53		# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
54	Month		Therm	kWh	kW		Therm ¹	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
55	January																
56	February																
57	March																
58	April																
59	May																
60	June																
61	July																
62	August																
63	September																
64	October																
65	November																
66	December																
67	YTD Total	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
68																	
69	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month in Table 2B.																
70	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.																
71	¹ - Savings calculated via deemed savings; NMEC methodology continues to be reviewed and evaluated with the Energy Division																

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies												
2	Southern California Gas Company												
3	January 2020												
4													
5		Authorized 4-Year Budget			Current Month Expenses			Expenses Since Jan. 1, 2017			% of 4-Year Budget Expended		
6		Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
7	Pilots												
8	Smart Thermostat Pilot ¹	N/A	\$ 1,000,000	\$ 1,000,000	N/A	\$ 30,950	\$ 30,950	N/A	\$ 186,572	\$ 186,572	N/A	18.66%	18.66%
9	Total Pilots	N/A	\$ 1,000,000	\$ 1,000,000	N/A	\$ 30,950	\$ 30,950	N/A	\$ 186,572	\$ 186,572	N/A	18.66%	18.66%
10	Studies												
11	Low Income Impact Evaluation ²	N/A	\$ 137,500	\$ 137,500	N/A	\$ -	\$ -	N/A	\$ 139,547	\$ 139,547	N/A	101.49%	101.49%
12	Low Income Needs Assessment ^{2,3}	N/A	\$ 125,000	\$ 125,000	N/A	\$ (592)	\$ (592)	N/A	\$ 246,582	\$ 246,582	N/A	197.27%	197.27%
13	Cost-Effectiveness/NEBs ²	N/A	\$ 37,500	\$ 37,500	N/A	\$ -	\$ -	N/A	\$ 37,500	\$ 37,500	N/A	100.00%	100.00%
14	Rapid Feedback Research / Analysis ⁴	N/A	\$ 200,000	\$ 200,000	N/A	\$ -	\$ -	N/A	\$ 26,908	\$ 26,908	N/A	13.45%	13.45%
15	Total Studies	N/A	\$ 500,000	\$ 500,000	N/A	\$ (592)	\$ (592)	N/A	\$ 450,537	\$ 450,537	N/A	90.11%	90.11%
16													
17	¹ Reflects the authorized funding per Clear Plan pursuant to Resolution G-3532 .												
18	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.												
19	³ Overspent related to 4-year Impact Evaluation study budget due to timing of billing from Lead IOU for cost related to 2016.												
20	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.												
21	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.												

**Energy Savings Assistance Program Table 7 (Second Refrigerators, In-Home Education, MyEnergy/My Account Platform)
Southern California Gas Company
January 2020**

7A - Households Receiving Second Refrigerators			
Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to less than 6 occupants
Second Refrigerators	Each	N/A	N/A

7B - Households Receiving In- Home Energy Education Only		
Measures	Units	Households that Only Received Energy Education
In-Home Energy Education	Home	

7C - Households for My Energy/My Account Platform		
Opt-Out	Already Enrolled	Opt-In

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	CARE Table 1 - CARE Program Expenses												
2	Southern California Gas Company												
3	January 2020												
4													
5		Authorized Budget ¹			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
6	CARE Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
7	Outreach	N/A	\$ 4,004,885	\$ 4,004,885	N/A	\$ 154,593	\$ 154,593	N/A	\$ 154,593	\$ 154,593	N/A	3.86%	3.86%
8	Processing / Certification Re-certification	N/A	\$ 2,966,518	\$ 2,966,518	N/A	\$ 95,872	\$ 95,872	N/A	\$ 95,872	\$ 95,872	N/A	3.23%	3.23%
9	Post Enrollment Verification	N/A	\$ 154,833	\$ 154,833	N/A	\$ 2,687	\$ 2,687	N/A	\$ 2,687	\$ 2,687	N/A	1.74%	1.74%
10	IT Programming	N/A	\$ 1,037,796	\$ 1,037,796	N/A	\$ 27,683	\$ 27,683	N/A	\$ 27,683	\$ 27,683	N/A	2.67%	2.67%
11	Cooling Centers	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
12													
13	Pilots/CHANGES	N/A	\$ 437,502	\$ 437,502	N/A	\$ 57,177	\$ 57,177	N/A	\$ 57,177	\$ 57,177	N/A	13.07%	13.07%
14	Measurement and Evaluation	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0.00%	0.00%
15	Regulatory Compliance	N/A	\$ 475,858	\$ 475,858	N/A	\$ 31,278	\$ 31,278	N/A	\$ 31,278	\$ 31,278	N/A	6.57%	6.57%
16	General Administration	N/A	\$ 953,729	\$ 953,729	N/A	\$ 46,045	\$ 46,045	N/A	\$ 46,045	\$ 46,045	N/A	4.83%	4.83%
17	CPUC Energy Division	N/A	\$ 60,000	\$ 60,000	N/A	\$ 5,313	\$ 5,313	N/A	\$ 5,313	\$ 5,313	N/A	8.86%	8.86%
18													
19	SUBTOTAL MANAGEMENT COSTS	N/A	\$ 10,091,122	\$ 10,091,122	N/A	\$ 420,648	\$ 420,648	N/A	\$ 420,648	\$ 420,648	N/A	4.17%	4.17%
20													
21	CARE Rate Discount	N/A	\$ 135,012,254	\$ 135,012,254	N/A	\$ 23,757,281	\$ 23,757,281	N/A	\$ 23,757,281	\$ 23,757,281	N/A	17.60%	17.60%
22													
23	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	N/A	\$ 145,103,376	\$ 145,103,376	N/A	\$ 24,177,929	\$ 24,177,929	N/A	\$ 24,177,929	\$ 24,177,929	N/A	16.66%	16.66%
24													
25	Other CARE Rate Benefits												
26	- DWR Bond Charge Exemption												
27	- CARE PPP Exemption				N/A	\$ 2,301,147	\$ 2,301,147	N/A	\$ 2,301,147	\$ 2,301,147			
28	- California Solar Initiative Exemption												
29	- kWh Surcharge Exemption												
30	Total Other CARE Rate Benefits				N/A	\$ 2,301,147	\$ 2,301,147	N/A	\$ 2,301,147	\$ 2,301,147			
31													
32	Indirect Costs				N/A	\$ 102,663	\$ 102,663	N/A	\$ 102,663	\$ 102,663			
33													
34	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.												
35	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.												

**CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
Southern California Gas Company
January 2020**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1																										
2																										
3																										
4																										
5		New Enrollment									Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)		
6		Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)	
7	2019	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
8	January	2,214	1,524	80	3,818	5,635	5,465	10,500	0	21,600	25,418	4,786	12,476	18,833	36,095	11,373	2,606	199	12,180	26,358	61,513	-940	1,608,798	1,671,895	96.23%	
9	February																									
10	March																									
11	April																									
12	May																									
13	June																									
14	July																									
15	August																									
16	September																									
17	October																									
18	November																									
19	December																									
20	YTD Total	2,214	1,524	80	3,818	5,635	5,465	10,500	0	21,600	25,418	4,786	12,476	18,833	36,095	11,373	2,606	199	12,180	26,358	61,513	-940	1,608,798	1,671,895	96.23%	

21

22 ¹ Enrollments via data sharing between the IOUs.

23 ² Enrollments via data sharing between departments and/or programs within the utility.

24 ³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.

25 **Note:** Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

	A	B	C	D	E	F	G	H	I
1	CARE Table 3A - Post-Enrollment Verification Results (Model)								
2	Southern California Gas Company								
3	January 2020								
4									

5	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)	Total Households De-enrolled ²	% De-enrolled through Post Enrollment Verification ³	% of Total CARE Households De-enrolled
6	January	1,608,798	4,848	0.30%	6	44	50	1.03%	0.00%
7	February						0		
8	March						0		
9	April						0		
10	May						0		
11	June						0		
12	July						0		
13	August						0		
14	September						0		
15	October						0		
16	November						0		
17	December						0		
18	YTD Total	1,608,798	4,848	0.30%	6	44	50	1.03%	0.00%

19

20 ¹ Includes all participants who were selected for high usage verification process. Closed accounts will not be tracked in Ineligible or De-enrolled

21 ² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

22 ³ Verification results are tied to the month initiated and the high usage verification process allows customers 90 days to respond to the verification process. Results may be pending due to the time permitted for a participant to respond.

23 **Note:** Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments

24

25	CARE Table 3B Post-Enrollment Verification Results (High Usage)								
26	Southern California Gas Company								
27	Not Applicable to SoCalGas								

28	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)	Total Households De-enrolled ²	% De-enrolled through HUV Post Enrollment Verification ³	% of Total CARE Households De-enrolled
29	January								
30	February								
31	March								
32	April								
33	May								
34	June								
35	July								
36	August								
37	September								
38	October								
39	November								
40	December								
41	YTD Total	0	0	0.00%	0	0	0	0.00%	0.00%

42

43 ¹ Includes all participants who were selected for high usage verification process. Closed accounts will not be tracked in Ineligible or De-enrolled

44 ² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

45 ³ Verification results are tied to the month initiated and the high usage verification process allows customers 90 days to respond to the verification process. Results may be pending due to the time permitted for a participant to respond.

46 **Note:** Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

	A	B	C	D	E	F	G
1	CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹						
2	Southern California Gas Company						
3	January 2020						
4							
5		Provided²	Received	Approved³	Denied⁴	Pending/Never Completed⁵	Duplicates⁶
6	Total (Y-T-D)	113,238	40,552	30,182	6,669	2,804	897
7	Percentage		100.00%	74.43%	16.45%	6.91%	2.21%
8							
9	¹ Includes sub-metered customers.						
10	² An estimated number that includes customers who 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 application.						
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 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.						
15	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.						

	A	B	C	D	E	F	G	H	I	J
1	CARE Table 5 - Enrollment by County									
2	Southern California Gas Company									
3	January 2020									
4										
5	County	Estimated Eligible Households			Total Households Enrolled			Penetration Rate		
6		Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	11,944	18	11,962	11,003	19	11,022	92.12%	104.23%	92.14%
8	Imperial	0	16,790	16,790	0	15,042	15,042	N/A	89.59%	89.59%
9	Kern	15,008	29,143	44,152	12,413	28,992	41,405	82.71%	99.48%	93.78%
10	Kings	8	12,013	12,021	10	14,743	14,753	125.27%	122.72%	122.72%
11	Los Angeles	851,439	2,834	854,274	825,669	1,194	826,863	96.97%	42.13%	96.79%
12	Orange	192,144	11	192,155	157,902	17	157,919	82.18%	158.42%	82.18%
13	Riverside	101,025	123,386	224,412	94,759	120,192	214,951	93.80%	97.41%	95.78%
14	San Bernardino	147,243	986	148,229	174,341	866	175,207	118.40%	87.80%	118.20%
15	San Luis Obispo	7,740	14,329	22,069	3,432	10,725	14,157	44.34%	74.85%	64.15%
16	Santa Barbara	31,854	1,112	32,966	27,534	582	28,116	86.44%	52.33%	85.29%
17	Tulare	11,268	45,059	56,327	11,931	48,451	60,382	105.88%	107.53%	107.20%
18	Ventura	54,227	2,201	56,428	47,437	1,544	48,981	87.48%	70.15%	86.80%
19	Total	1,423,901	247,883	1,671,785	1,366,431	242,367	1,608,798	95.96%	97.77%	96.23%
20										
21	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.									

	A	B	C	D	E	F	G	H
1	CARE Table 6 - Recertification Results							
2	Southern California Gas Company							
3	January 2020							
4								
5	Month	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	1,608,798	21,210	1.32%	2,269	65	10.70%	0.00%
7	February							
8	March							
9	April							
10	May							
11	June							
12	July							
13	August							
14	September							
15	October							
16	November							
17	December							
18	YTD Total	1,608,798	21,210	1.32%	2,269	65	10.70%	0.00%
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 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.							
24	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.							

	A	B	C	D	E	F	G
1	CARE Table 7 - Capitation Contractors ¹						
2	Southern California Gas Company						
3	January 2020						
4							
5	Contractor	Contractor Type				Total Enrollments	
6		(Check one or more if applicable)				Current	Year-to-Date
7		Private	CBO	WMDVBE	LIHEAP	Month	
8	Community Action Partnership of Orange County		X	X	X	0	0
9	ELA Communications Energy ED Program		X			0	0
10	PACE – Pacific Asian Consortium in Employment		X	X	X	0	0
11	Community Pantry of Hemet		X			0	0
12	Community Action Partnership of San Bernardino		X		X	0	0
13	LA Works		X			0	0
14	Children’s Hospital of Orange County		X			0	0
15	LACDA		X			0	0
16	YMCA Montebello-Commerce		X			0	0
17	Sr. Citizens Emergency Fund I.V., Inc.		X			0	0
18	Coachella Valley Housing Coalition		X			0	0
19	Southeast Community Development Corp.		X			0	0
20	Latino Resource Organization		X			0	0
21	Community Action Partnership - Kern County		X			0	0
22	Ventura Cty Comm Human		X			0	0
23	Blessed Sacrament Church		X			0	0
24	Hermanidad Mexicana		X			0	0
25	CSET		X			0	0
26	Crest Forest Family and Community Service		X			0	0
27	CUI – Campesinos Unidos, Inc.		X	X	X	0	0
28	Veterans in Community Service		X	X	X	0	0
29	MEND		X			0	0
30	Catholic Charities of LA – Brownson House		X			0	0
31	OSCC, Inc. (Orange County Community Center)		X			0	0
32	APAC Service Center		X			0	0
33	Visalia Emergency Aid Council		X			0	0
34	Total Enrollments					0	0
35							
36	¹ All capitation contractors with contracts are listed regardless of whether they have signed up customers or submitted invoices this year.						
37	Note: agencies marked with an asterisk (*) are also CHANGES CBOs. At the 9/27/19 CHANGES Quarterly Meeting, the IOUs were informed that these organizations' CARE capitation contracts will be terminated. They will, however, remain CHANGES CBOs.						
38	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

	A	B	C	D	E	F	G	H	I
1	CARE Table 8 - Participants as of Month-End								
2	Southern California Gas Company								
3	January 2020								
4									
5	Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration	% Change ¹	Total Residential Accounts ²
6	January	N/A	1,608,798	N/A	1,608,798	1,671,895	96.23%	-0.14%	5,636,985
7	February	N/A		N/A					
8	March	N/A		N/A					
9	April	N/A		N/A					
10	May	N/A		N/A					
11	June	N/A		N/A					
12	July	N/A		N/A					
13	August	N/A		N/A					
14	September	N/A		N/A					
15	October	N/A		N/A					
16	November	N/A		N/A					
17	December	N/A		n/a					
18	YTD Total	N/A	1,608,798	N/A	1,608,798	1,671,895	96.23%	-0.14%	5,636,985
19									
20	¹ The YTD amount represents a sum of all the total CARE participant changes each month.								
21	² Data represents total residential gas households. This includes submetered households.								
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.								

	A	B	C	D	E
1	CARE Program Table 9 - Expenditures for Pilots Southern California Gas Company January 2020				
2					
3					
4					
5	2019	Authorized Budget ¹	Current Month Expenses	Expenses Since Jan. 1, 2019	% of 2019 Budget Expended
6		Total	Total	Total	Total
7	Pilots				
8	CHANGES	\$ 437,502	\$ 57,177	\$ 57,177	13.07%
9	PCT	\$ -	\$ -	\$ -	0.00%
10	Total Pilots	\$ 437,502	\$ 57,177	\$ 57,177	13.07%
11					
12	¹ Authorized funding per year in D.16-11-022 and updated via Resolution G-3532 addressing conforming Advice Letters 5111-A and 5111-B.				
13	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.				

CARE Table 10
CHANGES: Monthly summary of ratepayers provided education, needs assistance and
dispute resolution services¹
Southern California Gas Company
Reporting Period: December 2019

No. of attendees at Consumer Education sessions

529

SCG -- Disputes Resolved	
Stop Disconnection	1
TOTAL	1

Note: The total number of services may exceed the total number of cases because some cases will include more than one service provided.

SCG -- Disputes Resolved by Language	
Spanish	1
TOTAL	1

SCG - Needs Assistance	
CARE Recertification/Audit	1
Assisted with Changes to Account	2
CARE Enrollment	5
HEAP/LiHEAP	23
Set Up New Account	1
Payment Extension	2
TOTAL	34

SCG - Needs Assistance by Language	
Armenian	17
English	7
Korean	5
Spanish	4
Vietnamese	1
TOTAL	34

¹ Information provided by CHANGES contractor.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.

CARE Table 11 - CHANGES Group Customer Assistance Sessions ¹
Southern California Gas Company
December 1 - 31, 2019

Date	Session Language	Consumer Education Topic	Session Logistics			
			# of Sessions	Length ² (Hours)	Number of Attendees	Description of Information / Literature Provided
N/A	Cantonese	Avoiding Disconnection	1	N/A	37	CHANGES Ed Handout
N/A	Mandarin	Avoiding Disconnection	1	N/A	3	CHANGES Ed Handout
N/A	Vietnamese	Avoiding Disconnection	1	N/A	23	CHANGES Ed Handout
		Total	3		63	
N/A	English	CARE/FERA and Other Assistance Programs	2	N/A	9	CHANGES Ed Handout
N/A	Mandarin	CARE/FERA and Other Assistance Programs	3	N/A	118	CHANGES Ed Handout
N/A	Spanish	CARE/FERA and Other Assistance Programs	7	N/A	124	CHANGES Ed Handout
N/A	Vietnamese	CARE/FERA and Other Assistance Programs	2	N/A	45	CHANGES Ed Handout
		Total	14		296	
N/A	Spanish	Electric and Natural Gas Safety	1	N/A	44	CHANGES Ed Handout
N/A	Tagalog	Electric and Natural Gas Safety	2	N/A	30	CHANGES Ed Handout
		Total	3		74	
N/A	Cantonese	Energy Conservation	1	N/A	29	CHANGES Ed Handout
N/A	Mandarin	Energy Conservation	2	N/A	35	CHANGES Ed Handout
		Total	3		64	
N/A	Spanish	Gas Aggregation	1	N/A	22	CHANGES Ed Handout
		Total	1		22	
N/A	Cantonese	High Energy Use	1	N/A	35	CHANGES Ed Handout
N/A	Mandarin	High Energy Use	1	N/A	2	CHANGES Ed Handout
		Total	2		37	
N/A	Armenian	Level Pay Plan	13	N/A	103	CHANGES Ed Handout
N/A	Cantonese	Level Pay Plan	1	N/A	20	CHANGES Ed Handout
N/A	Mandarin	Level Pay Plan	1	N/A	10	CHANGES Ed Handout
		Total	15		133	
N/A	English	Understanding Your Bill	14	N/A	70	CHANGES Ed Handout
N/A	Korean	Understanding Your Bill	3	N/A	8	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	16	N/A	266	CHANGES Ed Handout
N/A	Vietnamese	Understanding Your Bill	1	N/A	24	CHANGES Ed Handout
		Total	34		368	
		Monthly Total ³	75		1,057	

¹ This table was provided by CHANGES contractor, Self Help for the Elderly, via CSID for SoCalGas and Southern California Edison combined.

² Contractor states all sessions at least 30 minutes.

³ As of July 2019, totals are reported on a monthly basis.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months, and may reflect YTD adjustments.