

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

Application of Pacific Gas and Electric Company
for Approval of its Energy Savings Assistance and
California Alternate Rates for Energy Programs
and Budgets for 2021-2026 Program Years.
(U39M)

And Related Matters.

Application 19-11-003
(Filed November 4, 2019)

Application 19-11-004
Application 19-11-005
Application 19-11-006
Application 19-11-007

**ANNUAL REPORT OF SOUTHERN CALIFORNIA GAS COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2021**

[PUBLIC VERSION]

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Dated: May 27, 2022

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This report presents the results and expenditures for Southern California Gas Company's (SoCalGas) California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program for Program Year (PY) 2021. The purpose of this report is to consolidate activity for the CARE and ESA Programs and provide the California Public Utilities Commission's (Commission or CPUC) Energy Division (ED) with all the necessary information to analyze SoCalGas's low-income programs. Pursuant to Rule 16.6 of the Commission Rules of Practice and Procedure, Southern California Edison Company (SCE) submitted a joint extension request on behalf of the Investor-Owned Utilities (IOUs), requesting a 30-day extension until June 1, 2022, to submit the Low-Income (LI) Annual Report for Program Year (PY) 2021. The IOUs' LI Annual Report is due on May 1, 2022, in compliance with Decision (D.)16-11-022,

and as modified by D.17-12-009 and continued in D.21-06-015.¹ On April 29, 2022, the Commission granted the extension request to June 1, 2022, to submit the Annual Report.²

Respectfully Submitted
on behalf of Southern California Gas Company,

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¹ April 22, 2022, Joint Request for Extension for the Low-Income Annual Report Submittal.

² April 29, 2022, Letter Granting Extension to File Low Income Annual Report A.19-11-003.



Energy Savings Assistance Program

and

California Alternate Rates for Energy Program

Annual Report

[Public Version]

2021 Results

June 1, 2022

ESA PROGRAM AND CARE ANNUAL REPORT

TABLE OF CONTENTS

Title	Page
1. ESA PROGRAM EXECUTIVE SUMMARY.....	3
1.1 Energy Assistance Savings Program Overview.....	5
1.2 Marketing, Education and Outreach	7
1.3 Energy Savings Assistance Program Customer Enrollment Evaluation	26
1.4 Disability Enrollment Efforts.....	30
1.5 Leveraging Success Including LIHEAP.....	36
1.6 Integration Success	42
1.7 Workforce Education & Training.....	51
1.8 Studies.....	59
1.9 Pilots	67
1.10 “Add Back” Measures	67
1.11 Low Income Working Groups	68
1.12 Annual Public ESA Program and CARE Meeting.....	72
1.13 Multifamily Properties	72
2. CARE EXECUTIVE SUMMARY	87
2.1 Participant Information	92
2.2 CARE Program Summary.....	98
2.3 CARE Program Costs	99
2.4 Outreach	103

2.5	<i>Processing CARE Applications.....</i>	<i>146</i>
2.6	<i>Program Management</i>	<i>150</i>
2.7	<i>Pilots</i>	<i>150</i>
2.8	<i>Studies</i>	<i>150</i>
3.	CARE EXPANSION PROGRAM.....	150
3.1	<i>Participant Information</i>	<i>150</i>
3.2	<i>Usage Information</i>	<i>151</i>
3.3	<i>Program Costs</i>	<i>151</i>
3.4	<i>Outreach</i>	<i>152</i>
3.5	<i>Program Management</i>	<i>156</i>
4.	FUND SHIFTING.....	156
4.1	<i>ESA fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-02 and D. 17-12-009.</i>	<i>156</i>
4.2	<i>CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-022 and D. 17-12-009</i>	<i>156</i>
4.3	<i>ESA or CARE fund shifting activity that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-022 and D. 17-12-009</i>	<i>156</i>
5.	COMMONLY USED ACRONYMS	157
6.	APPENDIX A: COLLATERAL MATERIALS	159
6.1	<i>ESA Program Tables.....</i>	<i>159</i>
6.2	<i>CARE Tables</i>	<i>160</i>
6.3	<i>Tribal Outreach Contacts</i>	<i>161</i>

ENERGY SAVINGS ASSISTANCE (ESA) PROGRAM ANNUAL REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

The Southern California Gas Company's (SoCalGas) Energy Savings Assistance (ESA) Program offers weatherization services, energy efficient appliances, and energy education at no cost to qualified low-income, natural gas customers within its service territory. The program is designed to help customers save energy, thus reducing their natural gas bill, while at the same time contributing to their health, comfort, and safety (HCS). This annual report presents the achievements and expenditures for SoCalGas's ESA Program for Program Year (PY) 2021.

When 2021 began, the California Public Utilities Commission (CPUC or Commission) had yet to approve SoCalGas's 2021-2026 Low Income Application³ by the November 16, 2020, deadline (45 days prior to the end of the prior approved budget cycle). Since no Commission vote was taken by this date, a six-month bridge-funding period was approved. The Commission authorized bridge funding to cover ESA Program activities for January 1 through June 30, 2021.⁴ During this bridge period, SoCalGas was required to meet interim progress milestones and retain a sufficient budget to treat remaining homes to meet the bridge period goal.⁵ Additionally, ESA Program Multifamily Building Common Area Measures (MF CAM) and first-time treatment of the associated tenant

³ Application 19-11-006 of SoCalGas for Approval of Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for 2021-2026 Program Years.

⁴ D.19-06-022, pp. 13-14.

⁵ D.19-06-022, p. 13.

units, were allowed to continue through this bridge period utilizing unspent funds from the prior program cycle.⁶

SoCalGas entered the six-month bridge period and continued to prioritize treating first-time customers during the first half of PY2021. During this bridge period, the program operated through similar parameters of the previous decision on ESA and CARE budgets for Program Years 2015-2017⁷ until the Commission approved a new decision for the 2021-2026 program cycle. Simultaneously, SoCalGas continued to navigate through the challenges of the COVID-19 pandemic following federal, state, and local guidelines and continued to deliver virtual and in-person treatments to its customers throughout the year. Working through the challenges of the COVID-19 pandemic in 2021 involved continuing to follow the mandates of Resolution E-5074, which called for the IOUs to provide advance payments (provided in 2020) to prime contractors and provide a Post-Pandemic Return to Service (PPRS) credit for contractors to ramp up to return to work after the program suspension period in 2020.⁸ Contractors were given until December 31, 2021, to repay the advance payments.⁹

SoCalGas implemented and executed the PPRS credit mechanism to assist contractors in paying back their advance payments by December 31, 2021.

⁶ *Id.*

⁷ Decision 16-11-022, modified by D.17-12-009. §

⁸ Resolution (Res) E-5074 was approved on May 28, 2020, requiring a 60-day advance payment offer to ESA Program contractors to cover the period of suspended activity and establishing a Post-Pandemic Return to Service (PPRS) credit and earning period. SoCalGas instituted the PPRS and allowed for eligible costs paid with advance funds during the ESA Program suspension period (March 18 - May 31, 2020) through the use of PPRS credits.

⁹ Res. E-5074 at OP 5.

- 31 contractors received advance payments
- 22 contractors qualified to offset some of their advance payments with PPRS credits
- Seven contractors repaid 90% or more of their advance payments using PPRS credits
- Of these, three contractors were able to repay the entirety of their advance payments with PPRS credits alone

On June 3, 2021, Decision (D.) 21-06-015 was approved and effectively began the new ESA Program cycle on July 1, 2021, for the remainder of the year through December 31, 2026. The decision set-forth several deliverables SoCalGas was required to meet to kick off the new program cycle. These deliverables included the following:

Deliverable	Delivery/Due Date
File a Tier 1 Advice Letter to update Multifamily budgets for 2021-2022.	August 2, 2021 (within 60 days of the decision approval)
Provide requirements for all solicitation processes with the other Investor-Owned Utilities (IOUs).	August 18, 2021 (within 90 days of the decision approval)
File a Joint IOU Tier 2 Advice Letter (AL) providing common measure tiers.	September 1, 2021 (within 90 days of the decision approval)
Conduct ESA Program Pilot Workshop.	October 1, 2021 (within 120 days of the decision approval)
Conduct an all-IOU Clean Energy Programs Workshop.	October 1, 2021 (within 120 days of the decision approval)
File Tier 2 AL outlining the Data and Visualization Dashboard.	October 1, 2021 (within 120 days of the decision)
File Joint IOU Tier 1 AL coordinating with Clean Energy Programs.	October 30, 2021 (within 30 days after the Clean Energy Workshop)
Conduct ESA Program Solicitation 101 Workshop.	November 16, 2021
File Joint SCE and SoCalGas Program Implementation Plan (PIP) Tier 2 AL	November 24, 2021 (within 90 days after the Pilot Workshop)

SoCalGas began shifting the ESA Program's focus from the 2020 treatment goal - to treat every willing and eligible customer – to a program which targets deeper energy savings.

SoCalGas worked extensively with the other IOUs in 2021 to build a path toward shaping the new ESA Program.

Even as the focus of the program shifted mid-year, SoCalGas exceeded its treatment goals for both the bridge funding period as well as the new program cycle treatment target in the second half of the year.

1.1 Energy Savings Assistance Program Overview¹⁰

SoCalGas's ESA Program services all willing and eligible low-income customers by providing all feasible ESA Program measures. The identification of these feasible measures is determined through the outreach, assessment, and installation processes. In PY2021, the ESA Program treated a total of 131,745 homes including 66,406 first-time treatments. SoCalGas had not treated over 130,000 homes since 2011.¹¹

SoCalGas provided a comprehensive mix of services in 2021 to eligible ESA Program participants. SoCalGas provided the following measures to homes:

- In-home energy education;
- envelope and air sealing;
- attic insulation improvements;

¹⁰ Please note: as an update to SoCalGas's 2020 Low Income Programs Annual Report, the updated Homes Treated total for 2020 is 125,897 homes. The 2020 Annual Report reported 126,126 homes treated which is 229 more homes. The 229 homes originally counted as having been treated, were later discovered through the SoCalGas inspection process to have not received any measures. This was a unique circumstance in providing simple measures without a Property Owner Authorization (POA) when ESA and its customers were exercising safe social-distancing practices due to the COVID-19 pandemic. During SoCalGas's inspection process, it was realized that contractors left simple measures with the customers rather than installing them when customers did not feel safe having the contractors in their homes.

¹¹ See Table 4. SoCalGas treated 161,020 units in 2011

- low-flow showerheads and faucet aerators;
- furnace clean and tune measures; and
- duct sealing weatherization.

In addition, SoCalGas provided and/or serviced 47,619 appliances that includes 33,078 water heaters, 7,172 furnaces and 7,369 High Efficiency (HE) clothes washers. The average per home lifecycle bill savings for the PY2021 ESA Program was \$52.77.

ESA Program expenditures and therm savings for PY2021 are reflected in the following summary table.

1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in D.14-08-030, D.16-11-022, D.17-12-009 and D.21-06-015:

2021 Program Summary			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	\$134,133,334	\$112,910,354	84%
Homes Treated	120,000	131,745	110%
Therms Saved	N/A	920,685	N/A

* Authorized bridge period funding and homes treated goals for January-June 2021 per AL 5501. Authorized funding and homes treated goals for July-December 2021 per D.21-06-015. Authorized budget does not include unspent funds carried over from prior cycles, per D. 19-06-033.

Although the ongoing pandemic continued to be a challenging environment to operate within, SoCalGas was able to provide great customer satisfaction and program delivery experiences. SoCalGas surveyed customers quarterly in 2021 to facilitate an understanding of customer satisfaction with the overall ESA Program.

The PY2021 survey results showed 74% of customers rated their overall quality of service as “excellent” or “very good.”¹² Additionally, 84% rated their sign-up experience as “excellent” or “very good,” 81% rated their quality of installation experience as “excellent” or “very good” and 84% rated their quality of inspection as “excellent” or “very good.” SoCalGas and its contractor network continued to foster improvements in service quality to achieve superior customer service results.

The survey helped SoCalGas evaluate its performance in specific elements of the program including enrollment, installation, and inspection visits. These customized evaluations were used to help ESA Program contractors understand customer viewpoints and to develop insight on ways to enhance and improve service delivery.

1.2 Marketing, Education and Outreach

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

In PY2020, the Clear Plan targeted customers that had not previously participated in the ESA Program and that had been identified as potentially eligible using various factors, including PRIZM code status, enrollment in the CARE program, prior Post Enrollment Verification (PEV) of CARE, and market data collected by a leading consumer data

¹² Customers provide ratings for each attribute on a scale consisting of “Excellent,” “Very Good,” “Good,” “Fair” and “Poor.”

company. SoCalGas continued the Clear Plan strategy through the bridge period in the first half of PY2021, and customers continued to be targeted by ZIP code to align with contractor assignments. Prior to a contractor contacting customers, SoCalGas sent customers emails, direct mail letters and/or text messages with their assigned contractor's contact information encouraging them to call to set up an appointment. The method of communication was determined by the contact information SoCalGas had on file for each customer. Sending a comprehensive mix of communication materials prior to the initial contact by the contractor provided context and built trust for the customer, thus increasing the chances of enrollment. In total, 309,565 direct mail letters, 455,524 emails, and 273,724 text messages were sent in 2021 as part of the Clear Plan.

Once the new 2021-2026 program cycle began in the second half of 2021, SoCalGas concluded Clear Plan activities but continued marketing and communication efforts to increase program awareness and reduce barriers that prevent customers from participating, such as trust and lack of program recognition. As SoCalGas moves from the goal of homes treated to therms savings, the purpose of these ongoing communications was to help build necessary awareness so that customers are willing to engage with and participate in the program. SoCalGas transitioned to targeting current California Alternate Rates for Energy (CARE) customers who had

not been recently treated by the program in the areas with lowest program enrollment via direct mail letters, emails, and text messages. It is anticipated that a customer's current participation in CARE may prompt them to learn more about and participate in the ESA Program as they have experience with a SoCalGas program. The direct-mail letter and email message included a high-level explanation of the program along with a list of available measures that customers may qualify for and encouraged customers to visit the program web page or call the program's phone number to learn more and apply. The text message focused on how the customer may qualify for home improvements by professional contractors at no cost and encouraged them to learn more using the program vanity URL (www.socalgas.com/Improvements). All leads from these communications efforts are sent to the ESA Program team and shared with contractors as appropriate. SoCalGas sent approximately 100,000 direct-mail letters, 100,000 emails, and 100,000 text messages during the second half of 2021 to these eligible CARE customers. As in previous years, the ESA Program email open and click-through rates (CTR) continued to perform above benchmarks, with the average open rate at 43.28% and the average CTR at 4.43%, showing interest and engagement with these targeted communications.

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

During the bridge period in the first half of PY2021, SoCalGas focused on the Clear Plan approach as part of its efforts to prioritize first-time treatments. In the second half of PY2021, SoCalGas focused on targeting current CARE customers in areas with low program enrollment. Instead of the Whole Neighborhood Approach (WNA), the program focused on marketing and communications to broader geographical areas based on program needs and customer characteristics in support of the new program cycle efforts. SoCalGas also continued its targeted outreach tactics to reach underserved customer segments in its service territory.

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

In 2021, SoCalGas continued several program delivery initiatives that were developed to increase the number of eligible customers treated by its ESA Program (emphasizing reaching households who had never participated in the program). These initiatives included new and improved techniques and programmatic adjustments in the following areas: Clear Plan, Marketing and Outreach (M&O), Enrollment & Assessment (E&A), and Operations.

Clear Plan

For the six-month bridge period of 2021, SoCalGas continued implementation of its Clear Plan initiative as described in AL 5256, which established a systematic process to reach out, individually, to every remaining eligible untreated customer.¹³ In doing so, SoCalGas contacted customers through multiple channels (printed materials, email, phone calls, text, door hangers and in-person visits) until an enrollment or refusal was recorded. If a customer was deemed unresponsive after multiple attempts, SoCalGas classified that customer as unwilling to participate in the program.

As part of its practice to identify which customers best to target, SoCalGas used multiple sources of demographic data to aid in determining potential eligibility for the ESA Program. As the number of sources that indicate eligibility increase, confidence also increases, but the total number of customers identified decreased. SoCalGas adjusted the number and selection of indicators to best fit the needs of its outreach efforts. Using this process, SoCalGas developed Clear Plan Lists: lists of customers likely eligible yet not treated by the ESA Program in geographically continuous areas (typically entire ZIP codes). After being identified, SoCalGas targeted direct mail letters, emails and eventually text

¹³ SoCalGas Advice Letter 5256-A, Low Income ESA Program Clear Plan Pursuant to Resolution G-3532, *available at*: <https://tariff.socalgas.com/regulatory/tariffs/tm2/pdf/5256-A.pdf>.

messaging campaigns to every customer on the list to increase program recognition prior to contractors placing phone calls and/or canvassing these same customers with the end goal of enrolling customers, recording a program refusal, or deeming non-responsive customers as unwilling. Throughout the first six months of 2021, SoCalGas generated 116 of these Clear Plan Lists, totaling nearly 310,000 potential first-time customers, using this coordinated marketing, phone contact, and in-person approach to identify as many willing customers as possible.

Building on Clear Plan efforts performed in previous years, SoCalGas continued working with a leading cloud-based software company to deliver its electronic outreach efforts to customers on Clear Plan Lists prior to providing those lists to the contractor network. As part of its practice, each customer identified on a Clear Plan List with an email on file was sent an initial email followed two days later by a second email. For those customers identified as Spanish speaking, the second email they received was translated in Spanish. If after these email efforts a customer neither responded with interest in ESA Program services nor refused program services, then the customers with a mobile phone number on file were sent an initial text. Similar to the approach with emails, those customers identified as Spanish speaking were sent a second text that was translated in Spanish two days after the initial text. Each of these electronic marketing efforts provided a high-level overview of the ESA

Program, links unique to each customer (embedded in every email and text for the customer to click if they were either interested in the contractor making contact with them or if they wished to refuse program services), as well as the contact information for their assigned contractor (this gave customers the ability to reach out to their assigned contractor at their discretion). Ultimately, these efforts were aimed at providing a multitude of options to customers to either express their interest in the program or provide an opportunity to express their lack of interest in the program by refusing program services.

Marketing and Outreach

Yearly ESA Program Paid Media Campaign

The pandemic impacted SoCalGas's plans to launch various ESA Program paid media efforts through PY2020 and early PY2021. However, SoCalGas was able to launch a month-and-a-half-long media campaign starting in November 2021 through mid-December 2021. The campaign's objective was to increase awareness among eligible customers across the SoCalGas service territory and reduce barriers customers may have to program enrollment, such as trust in the program and contractors.

Supporting the goal of the ongoing monthly ESA Program communications, this campaign complemented ongoing efforts to build necessary awareness, recognition, and trust so that customers are willing to engage with and participate in the program, especially as the program

and its goals evolve. The campaign targeted General and Hispanic markets and included a mix of channels, such as mobile, display, search, and social, to generate awareness and drive customers to the ESA Program webpage on socalgas.com to learn more and apply. The campaign focused on the message of, “Your home deserves upgrades. You deserve savings.” and reinforced that the program can help with no-cost home improvements to help customers save money and energy year-round. To try new ways to reach likely eligible customers, SoCalGas tested geofencing, or defining a perimeter around a specific location to provide viewers with relevant targeted messaging. For this campaign, unemployment and social services offices within the SoCalGas service territory were targeted to provide viewers at those locations with ESA Program mobile ads, contributing to 5,097 program webpage visits. In addition to radio commercials to reach customers who may not have internet or smartphone access, SoCalGas organized DJ endorsements of the ESA Program across KRRL, KLJH, and KLVE. When listeners hear a representative of their radio station of choice directly promote the ESA Program and its benefits, it lends legitimacy, and these radio efforts delivered 5,357,575 impressions. Through testing, results were also able to show certain designs and sizing of display advertisements generating more engagement, and SoCalGas will take such findings into future ESA Program campaign planning. Overall, the campaign resulted in:

- 23,807,840 total impressions, with display ads delivering the most impressions for both markets

- 13,707,883 total impressions across General Market
- 10,099,957 total impressions across Hispanic Market
- 57,800 total ESA Program webpage views with a 0:56 average session duration, demonstrating active viewer engagement
- 2,814,686 social media impressions, with 28,022 post engagements
- 570 online form submissions from November 1 to December 21, 2021, compared to 219 online form submissions from November 1 to December 21, 2020

SoCalGas plans to continue annual ESA Program paid media efforts through PY2022-2026 and continue to explore new ways to effectively reach eligible customers.

Email Optimization

To increase ESA Program participation, SoCalGas continued personalizing and sending email communications to potentially eligible customers in PY2021. During the first half of PY2021, the Clear Plan targeted customers who had never participated in the program. The personalized emails included the customer's name, the name of their assigned contractor, and the contractor's contact information. The email also captured responses from customers who were not interested and therefore, deemed unwilling.

During the second half of PY2021, emails continued to be personalized, and focused on targeting current CARE customers who had not recently participated in the program across areas with the lowest program

participation. As in previous years, these ESA Program email open and click-thru-rates (CTR) continued to perform above benchmarks, with the average open rate at 43.28% and the average CTR at 4.43%, showing interest and engagement with these targeted communications.

Texting Potentially Eligible Customers

In PY2021, SoCalGas continued texting potentially eligible customers with information on the ESA Program. During the first half of PY2021, the text message included the contractor's contact information as part of the Clear Plan, targeting eligible untreated customers. During the second half of PY2021, the text message targeted current CARE customers who had not recently engaged with the program across areas with the lowest program penetration. This text message was sent to approximately 100,000 customers and focused on how the customer may qualify for home improvements by professional contractors at no cost and encouraged them to learn more using the program vanity URL (www.socalgas.com/Improvements).

ESA Program Webpage Alignment

SoCalGas consistently updated the ESA Program webpage throughout PY2021 to reflect evolving health and safety guidelines throughout the pandemic to ensure the most up-to-date information was available for customers. SoCalGas continues to improve the ESA Program webpage by

including clear and consistent messaging for the program and processes as needed. The webpage will continue to be updated with new information and supportive tools (videos, new online platform, etc.) as the program evolves.

Reestablishing Monthly ESA Program Social Media Posts

In PY2021, SoCalGas restarted monthly social media posts promoting the ESA Program, previously paused due to the COVID-19 pandemic. These social posts were promoted throughout SoCalGas service territory to help build awareness of the program and drive viewers to the webpage to apply. On average, these posts reached approximately 5,011 customers on Facebook and 1,675 customers on Twitter, with Facebook delivering the highest views and engagements. The average Facebook cost-per-link-click was \$0.67. During months where a program had an ongoing paid media campaign, SoCalGas paused internally created program-specific posts to avoid conflicting efforts and instead shared a message generally promoting all SoCalGas customer assistance programs. This ensured interested viewers were still able to learn more about the ESA Program if they visited the main customer assistance programs webpage on a consistent basis.

Additional ESA Program Bill Communications

In PY2021, SoCalGas made an effort to promote the ESA Program across mailed bill communications whenever scheduling allowed. Unlike bill inserts, bill messages (messages printed directly on the customer's mailed bill) do not require a marketing budget. Bill messages are an ideal no-cost opportunity to reach targeted SoCalGas customers who prefer a printed bill instead of reviewing their bill online. In PY2021, ESA Program bill messages reached approximately 1,541,661 residential customers currently enrolled in the CARE program. SoCalGas also generally promoted SoCalGas's customer assistance programs via printed bill envelope messages, driving all residential customers, regardless of program status, with paper billing (approximately 2,568,559 customers) to the main customer assistance program webpage to learn more. SoCalGas will continue to schedule bill communications to widely promote the ESA Program to relevant audiences in PY2022.

Enrollment & Assessment (E&A)

Although certain adjustments were made to accommodate COVID-19 pandemic restrictions, the overall SoCalGas ESA Program E&A delivery strategies employed in 2021 remained consistent with previous years. Initial training for contractors providing E&A services focused on covering utility-specific items related to policies, eligibility documentation requirements and overall customer service standards, and methods geared at leveraging opportunities among other IOUs' low-income programs.

These approaches were further adjusted to support contractor efforts to meet Clear Plan and PY2021 goals by implementing changes designed to streamline the training process, reduce Program Representative wait time between receiving training and actively enrolling, and increasing access for candidates to train and test in order to maintain and grow contractor personnel levels. Some of these changes included streamlining the process of virtually enrolling customers into the ESA Program, removing redundant tasks previously performed at the time of enrollment, allowing contractors to provide their program overview training to canvassers and telemarketers, and continuing use of temporary badges for Program Representatives waiting for a Home Improvement Salesperson Registration (HISR). These and other workforce training improvements are discussed in greater detail in Section 1.7 Workforce Education and Training.

Contractor Legitimacy

In 2021, SoCalGas maintained the use of business cards with the ESA Program logo. SoCalGas also designed Program Representative polo shirts, and magnetic vehicle placards labeled “authorized contractor.” Each of these pieces was designed to legitimize program contractor personnel as they approach customers at their home and/or at community events.

Language Barriers

Another strategy SoCalGas utilized in 2021 to address language barriers at all stages of program implementation, was the continued use of a dedicated language translation line for ESA Program contractors to use in the field. Through this translation service, Program Representatives have access to over 80 different languages and live translators. The service also has the capability of live video translation for customers to overcome barriers associated with customer trust. An additional change in the delivery of program information and energy education designed to remove barriers that SoCalGas maintained was the translation of the Statewide Energy Education Guide (EE Guide) into six additional languages¹⁴ and Braille. In addition to having the EE Guide newly available in these languages, it was also made available on the SoCalGas ESA Program webpage. Having the EE Guide online also ensures customers requiring larger print can benefit from the information provided to customer participants during program enrollment.

Operations

Remaining compliant with COVID-19 pandemic ordinances, for the first six months of 2021 and in an effort to boost first time treatments, SoCalGas continued efforts utilized in previous years, including implementing new contractor procedures, adjusting contractor

¹⁴ Spanish, Chinese, Hmong, Korean, Russian, and Vietnamese.

compensation to support the new procedures, and making improvements to its systems to improve efficiency, as follows:

- SoCalGas continued to direct contractors to prioritize first-time enrollments and advised limiting retreatments only to those scenarios in which the customer reached out to the program or where retreatments were needed to fully service a multifamily (MF) building. In support of this prioritization, and in acknowledgement of the higher level of effort needed to identify and enroll first-time customers, SoCalGas maintained increased enrollment and weatherization fees introduced in 2019. First-time penetration was considered a critical metric when evaluating contractor performance. In addition, database system enhancements more effectively identified first-time customers and processed the resulting fees.
- Contractors were encouraged to install measures at the time of enrollment. Historically and in general, the first visit ESA Program representative makes to a home enrolls the customer, provides energy education, and performs an assessment of measure feasibility. A second visit is then scheduled with a weatherization installer to begin delivering measures. In some cases, the customer does not respond to attempts to schedule a second visit or does not answer the door at the time of the second appointment, resulting in an enrollment, but no measures installed. Encouraging contractor outreach personnel to install measures, known as simple measures, during the first visit allows the home to be counted as a treated unit, even if the customer ultimately does not follow through with the second visit. In addition, SoCalGas noted that receiving some measures on the first visit gave customers a feeling that the program is “real” and made them more likely to follow through with subsequent scheduled appointments. The procedure is limited by the fact that some Program Representatives performing the first visit, despite being skilled at customer outreach, may not be mechanically inclined and may not be comfortable handling potential installation scenarios that may occur with gas measures. SoCalGas’s approach has been to give contractors flexibility to install only the measures their Program Representatives were comfortable with and in the scenarios where they were comfortable doing so. For example, faucet aerators or showerheads may be installed by some Program Representatives only if they can be easily installed manually without the use of any tools. In 2021, SoCalGas continued offering incremental fees to encourage delivery of measures at the time of enrollment, in acknowledgement of the higher level of effort needed by contractors to prepare and equip their Program Representatives to

do so. In addition, database system enhancements more efficiently processed and tracked measures installed at the time of enrollment and allowed for a smoother handoff from the Program Representatives to the weatherization installer in cases where these individuals are dispatched from different contractor agencies.

- SoCalGas continued to allow contractors to install certain, less-invasive measures, prior to obtaining a Property Owner Authorization (POA). In general, these are the same measures that many contractors can install at the time of enrollment, due to their relative simplicity of installation. In order to support this initiative, SoCalGas continued to refine its system to allow for more flexible handling of the POA. Contractors combined this flexibility with the ability to install measures at the time of enrollment to make significant inroads in the multifamily segment in 2021. Multifamily homes made up 49% of treated enrollments in 2021, compared with 50% in 2020.
- SoCalGas pursued its Clear Plan List approach to outreach in the first half of 2021, under which neighborhoods were systematically targeted for coordinated direct mail, e-mail, and contractor canvassing or phone call efforts. To support these efforts from an operations perspective, SoCalGas continued an incremental fee structure in recognition of the contractor resources needed to systematically canvass an assigned list of addresses and/or attempt to reach these customers by phone and to document these processes in detail for SoCalGas's records. In addition, SoCalGas implemented new systems capabilities to allow for more efficient handling of Clear Plan Lists, including the assignment of lists to contractors in the form of leads, and processing of contractor results to allow for documentation of initiative progress and identification of unwilling customers, as well as treatment of willing customers. In the first half of 2021, SoCalGas assigned the final 310,000 leads to contractors through these coordinated Clear Plan Lists. This capped a three-year Clear Plan effort that produced 597 unique Clear Plan Lists consisting of nearly 1.3 million customers assigned to contractors as leads to either enroll, educate, and provide installation measures and services or to record customer unwillingness.

1.2.4 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up to date- list of Tribal contacts.

The COVID-19 pandemic has continued to hamper SoCalGas's ability to conduct in-person outreach with the majority of its partners and

organizations, including as it relates to Tribal Outreach. There are 20 Federally Recognized Tribes within SoCalGas's service territory, of which only seven have residential gas service meters, and are primarily on leased lands. SoCalGas's outreach efforts focus on working with tribal organizations and members in order to help build awareness on SoCalGas's Customer Assistance Programs (ESA, CARE, Medical Baseline, Etc.) and build trust amongst the community despite the majority not having access to natural gas service.

SoCalGas also works internally with Regional Public Affairs to continue to engage with its Tribal Community Partners and provide materials, information on programs, website links as well as extend outreach to conduct meetings and or make presentations on SoCalGas's Customer Assistance Programs to the tribal communities they serve. The vast majority of this outreach was conducted virtually in 2021.

Per D.16-11-022,¹⁵ SoCalGas Regional Public Affairs engaged with its Tribal Community Partners by providing materials, information, links and offering to make presentations on the ESA Program to its members. Efforts included:

¹⁵ D.16-11-022, OP 80.

- Outreach to the Tribal Association of Sovereign Indian Nations (TASIN), the American Indian Chamber of Commerce of California.
- Outreach to specific tribes included the Pechanga Band of Luiseño Indians, Morongo Band of Mission Indians, Soboba Band of Luiseño Indians, Torres Martinez Band of Desert Cahuilla Indians, Cahuilla Band of Indians, and Tejon Indian tribes.

In accordance with D.21-06-015, SoCalGas confirms that it has an up-to-date list of tribal contacts.¹⁶ The tribal outreach list contains contacts of tribes and tribal service organizations that SoCalGas has contacted in an effort to provide income-qualified assistance information. Every effort was made to contact tribal staff and not tribal members to preserve a level of privacy for tribal members. Those contacted and listed are either tribal administrators, government affairs, economic development or emergency services personnel. SoCalGas made an offer of direct engagement to all tribes contacted. Additionally, SoCalGas provided the tribes a referral/link to the [SoCalGas.com/assistance](https://www.socalgas.com/assistance) webpage, email and cell phone contact information for SoCalGas staff, and a one-page informational pamphlet provided in pdf and jpg formats for internal distribution to tribal members by the Tribal Administration. The list of tribal contacts is provided confidentially in Appendix A.

¹⁶ D.21-06-015, OP 192.

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

On December 19, 2018, the CPUC approved the implementation of the smart thermostat as a standard measure of the ESA Program for SoCalGas.

1.3 Energy Savings Assistance Program Customer Enrollment Evaluation

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

D.16-11-022 eliminated the Go-Back Rule throughout SoCalGas’s service territory.¹⁷ The Go-Back Rule prohibited homes already treated once since 2001 from being treated a second time. In PY2021, SoCalGas treated 66,406 customers for the first time since 2001. In addition, SoCalGas retreated 65,339 homes, bringing total 2021 treatments to 131,745.

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

In 2021, SoCalGas continued to use Categorical Eligibility (CE)¹⁸ and

¹⁷ D.16-11-022, OP 9.

¹⁸ Categorical programs include: Medicaid/Medi-Cal, Women, Infants and Children Program (WIC), Low-Income Home Energy Assistance Program (LIHEAP), Supplemental Nutrition Assistance Program, Tribal Temporary Assistance to Needy Families (TANF), Bureau of Indian Affairs General Assistance (BIA GA), and the National School Lunch Program.

self-certification¹⁹ as tools to streamline customer enrollments to the ESA Program. Both of these methods of determining eligibility decrease the required income documentation required for customers to enroll. With CE, customers who can provide documents validating participation in one of the designated state or federal assistance programs do not need to provide additional income documentation in order to enroll in the ESA Program and/or CARE. Throughout the year, SoCalGas maintained acceptance of enrollment in the National School Lunch Program (NSLP reduced meals) as an eligible CE program. With self-certification, customers who live in designated low-income PRIZM codes need to only provide a stated annual income and sign a statement certifying their income meets the program's income eligibility guidelines. In addition to these two enrollment methods, SoCalGas streamlined eligibility documentation requirements to ease program enrollment.

Categorical Eligibility: SoCalGas continues to provide the list of CE programs on its company website and in its ESA Program brochures which are printed in multiple languages (English, Spanish, Chinese, Korean, and Vietnamese). These channels are aimed at bringing customer awareness to the minimal documentation requirements for enrolling in the

¹⁹ In D.05-10-044, the CPUC allowed SDG&E and SoCalGas to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements enroll customers in the Energy Savings Assistance Program through self-certification if those customers lived in areas where 80% of the households were at or below 200% of the FPL. In D.06-08-025, D.06-12-038, and D. 08-11-031, the CPUC allowed continuation of the self-certification process described above.

ESA Program when a customer is already participating in certain CE programs. SoCalGas also reviews changes to CE program administration processes to update ESA Program CE documentation requirements with the intent of streamlining the enrollment process. For example, the Women, Infants & Children (WIC) program began a process of transitioning from a voucher-based system to an EBT Card. SoCalGas reviewed this change to the WIC program and provided contractors with updated documentation requirements to prove current WIC participation when a customer has transitioned from vouchers to an EBT card. Providing contractors clear direction as early as possible minimizes questions and the potential delay of a customer enrollment.

Self-certification: SoCalGas implements various methods to income qualify households via self-certification such as PRIZM code, CARE PEV, and leveraging other IOUs for enrollment or full documentation. In 2021, SoCalGas contractors continued enrolling customers using the self-certification enrollment method for renters residing in deed restricted properties. The enrollment type “Owner Verified” was developed to enroll customers using the joint IOU POA and Affidavit allowing owners to certify tenant’s eligibility for the program thereby removing the burden of requiring eligibility documentation from the tenant.

Other Enrollment Methods: Another strategy designed to streamline enrollments was the contractor-wide use of electronic signatures on program forms, specifically the joint IOU POA form in instances where owners live out of the state or country. In addition, SoCalGas also performed an extensive review of program eligibility documentation requirements to simplify the enrollment process. This included reducing the number of documents required and expanding the document qualification criteria for certain documents such as tax documents. SoCalGas continued to review its assessment requirements in order to remove redundant tasks from Program Representatives that ultimately were the installer responsibilities. With the removal of tasks deemed to no longer be the Program Representative's responsibility, the enrollment process is further streamlined and reduces the time to enroll customers into the program.

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

SoCalGas treated a total of 131,745 homes in PY2021. This total exceeded the total household treatment target of 120,000 homes in PY2021.²⁰

²⁰ D.21-06-015 matches the household treatment goals (60,000 homes) approved for the January 1- June 30, 2021, bridge period per SoCalGas Advice Letter 5501-G-A, per D.19-06-022 and D.20-08-033 for the remainder of 2021 (July 1, 2021 – December 31, 2021). This totals 120,000 homes treated goal for 2021.

1.4 Disability Enrollment Efforts

1.4.1 Provide a summary of efforts to which the IOU is meeting the 15% enrollment goal.

The penetration rate for disability enrollment efforts in PY2021 slightly increased to 6.71% from 6.05% in PY2020. As in previous years, SoCalGas continued its focus toward targeting increased enrollments within the disability community across all of SoCalGas's service areas. SoCalGas's liaison assigned to work with and expand the company's reach within the disabled community continued to leverage existing relationships to expand organizations in which to target, work with organizations serving the disabled community, provide educational materials, and facilitate information sessions and trainings for case workers and staff of organizations working with the disabled communities. Some of SoCalGas's highlights for disability outreach in PY2021 included working with key organizations and sponsoring some key events as listed below. Due to the COVID-19 pandemic, most events remain in a virtual environment.

- Organizations that SoCalGas collaborated with to promote Customer Assistance Programs (CAP) materials and build awareness to help increase enrollments as local, trusted resources for the disabled community include:
 - Blindness Support Services
 - Disabilities Community Resource Center
 - Fiesta Educativa
 - Frank D. Lanterman Regional Center
 - Goodwill of Orange County

- Orange County Autism Foundation
- South California Resource Services for Independent Living (SCRS-IL)
- Similar to 2020 COVID-19 pandemic restrictions, participation was cancelled at in-person events. Events continue to be virtual and the few in-person events were distribution events. Although participation was limited, SoCalGas still was visible at 232 events specifically held for the disability community and took place throughout SoCalGas's service territory. Some events are highlighted below:
 - Blindness Support Services Inc., One on One Touchpoints
 - Fiesta Educativa's Fiesta Familiares Zoom Workshops
 - Southern California Resource Services for Independent Living's Personal Protective Equipment (PPE), Essential Care Packages, and Food Distributions
 - Frank D. Lanterman's PPE, Essential Care Packages, and Food Distributions as well as online support and training meetings.
 - Orange County Autism Foundation Crisis Call Line, OC Health & Education Talk show on Local Public Access Television, and Kids Club Subscription information distribution

SoCalGas will continue to enhance its reach by employing various practices and approaches to remain connected with the disabled community.

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

In PY2021, SoCalGas continued to create and provide customer assistance program large print brochures with ESA Program information for vision-impaired customers. SoCalGas also created Braille customer assistance program brochures. These Braille brochures were sent to Community

Based Organizations (CBOs) that work directly with Braille users, were available for customers who visited SoCalGas Branch Payment Offices (BPOs) and were also available for outreach events.

In 2019, SoCalGas's My Account online bill pay system received the AA²¹ Seal of Approval from the Center for Accessible Technology (CforAT) for achieving AA accessibility standards to increase accessibility and improve the online experience in the "Account" section of the website. As of 2021, SoCalGas continues to hold this certification. SoCalGas reports the AA status on the CforAT annual report and remains in compliance.

The SoCalGas website regularly conducts audits and complies with the Web Content Accessibility Guidelines (WCAG). The website allows vision-impaired customers who use screen readers and similar assistive technologies to navigate and read its content and SoCalGas continues to update its website for customer accessibility.

²¹ Denotes WCAG level of compliance. To meet Level AA, a webpage must satisfy all Level A and Level AA success criteria or provide a Level AA conforming alternate version. All Federal web content and software created or altered on or after January 18, 2018, must conform to Level AA success criteria laid out in WCAG 2.0.

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

Disability Enrollments			
Source	Total Enrollment	Disability Enrollment	% of Disability Enrollment
Campaign	1,863	23	1%
Capitation	185	2	1%
CARE Referral	7,773	122	2%
Customer Assistance Representatives Referral	90	0	0%
CPUC 2020 Clear Plan	5,926	344	6%
Direct Mail	575	51	9%
Energy Efficiency Referral	1,069	107	10%
ESA Mobile	4,407	449	10%
Gas Bill Insert	393	35	9%
HEAT Canvassing List	2,221	193	9%
InfoLine 211	69	1	1%
Joint Utility Data Sharing	33	3	9%
Joint Utility ESA Program, SCE	40	6	15%
LIHEAP	75	3	4%
Master Agreement	370	23	6%
Media/Leveraging Dept./Event	64	0	0%
Muni	56	0	0%
Neighbor/Friend/Relative Referral	3,353	230	7%
Newspaper/Radio/Television	89	4	4%
Other Utility or Municipality Referral	3,122	303	10%
Outreacher – Canvassing	88,137	5,311	6%
Received Services at Another Location	198	12	6%
REN Referral	27	2	7%
SoCalGas – Gas Assistance Fund/Medical Baseline	12	1	8%
SoCalGas – Internet	446	36	8%
SoCalGas Referral	1,825	310	17%
SoCalGas Email	179	13	7%
Telemarketing – Telephone	3,163	376	12%
Univision – Telethon	11	3	27%
Virtual Enrollment	2,970	623	21%
WNA Approach	1,767	149	8%
WNA Census Self Cert	2	0	0%
Total	131,745	8,841	6.71%

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

Although the penetration rate for disabled enrollments fell below the 15% goal in PY2021, many efforts were pursued to enhance and expand outreach to the disability community. SoCalGas continued to partner with several key organizations such as Fiesta Educativa, Disability Community Resource Center, MEND San Fernando, and Southern California Rehabilitation Services - all trusted organizations that provide special resources for these communities. Due to COVID-19 pandemic restrictions, in-person events continued to be limited. SoCalGas's partnership included presenting at virtual workshops, virtual training of organization staff and case workers and distributing program materials both printed and electronic to be distributed during one-on-one visits (mostly virtual) with community members and at local community events.

Additionally, disability enrollments are tracked by ESA Program contractors who may not be aware of a customer's disability at the time of enrollment, particularly if the customer does not self-disclose their disability during the enrollment process. However, in PY2021 SoCalGas continued to increase collaborative partnerships that worked towards enrolling individuals with disabilities that may qualify for the ESA Program, CARE, or Medical Baseline Allowance (MBL). As in previous years, SoCalGas has continued to focus its efforts on organizations and events that are in areas that are underpenetrated in the programs in order to

reach special needs customers. Event numbers did increase in the community although most events and interactions were virtual, some distribution events were held to help the members of the community.

1.5 Leveraging Success Including LIHEAP

D.08-11-031 defined leveraging as “an IOU's effort to coordinate its LIEE programs with programs outside the IOU that serve low-income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low-income households.”²² In PY2021, SoCalGas continued to leverage resources to support low-income customers. Success is measured by tracking the following criteria:

- **Dollars saved:** Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU. Shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, and replacement and repair of measures, among others are just some examples of cost savings to the IOU.
- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.
- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

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

²² D.08-11-031, p. 180.

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

SoCalGas identifies participating agencies into two categories: Water Agencies/Providers and Municipal Electric Providers. Water agencies focus on water measures such as HE clothes washers, faucet aerators, low flow shower heads, thermostatic shower valves, tub spouts and low flow toilets. All participating agencies contribute to SoCalGas's ESA Program dollar savings and energy savings/benefits through co-funding of HE) clothes washers and/or the other water measures above. In PY2021 the following agencies participated in leveraging water measures:

- Anaheim Public Utilities²³
- California American Water²⁴
- Eastern Municipal Water District²⁵
- Elsinore Valley Municipal Water District²⁶
- Fontana Water Company²⁷
- Liberty Utilities²⁸

²³ Anaheim Public Utilities ("APU") – delivers water to the city of Anaheim's 345,000 residents and more than 15,000 businesses.

²⁴ California American Water serves customers throughout California, the partnership with SoCalGas focuses on customers residing in Los Angeles and Ventura Counties.

²⁵ Cities in the Eastern Municipal Water District service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula.

²⁶ Elsinore Valley Municipal Water District serves the cities of Lake Elsinore, Wildomar, Murrieta and Menifee.

²⁷ Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.

²⁸ Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.

- Metropolitan Water District²⁹
- Moulton Niguel Water District³⁰
- San Gabriel Valley Water Company³¹
- Western Municipal Water District³²
- Rancho California Water District³³

As a result, co-funding from all water agencies totaled \$605,955 in PY2021.

The other category for leveraging opportunities focuses on municipal electric providers through the ESA Program. SoCalGas administers programs for municipal electric providers by collaborating with ESA Program contractors to install electric measures such as LED bulbs, Smart Power Strips, LED Torchiere Lamps, A/C Tune-ups, Refrigerator Assessments, Duct Testing & Sealing, and Room A/C Replacement. Qualifying measures varied per electric provider and availability of

²⁹ Metropolitan Water District is a regional wholesaler that delivers water to 26-member public agencies: 14 cities, 11 municipal water districts, one county water authority – which in turn provides water to more than 19 million people in Los Angeles, Orange, Riverside, San Bernardino, and San Diego and Ventura counties.

³⁰ Moulton Niguel Water District services more than 170,000 customers in Laguna Niguel, Aliso Viejo, Mission Viejo, Laguna Hills, Dana Point, and San Juan Capistrano.

³¹ 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.

³² Western Municipal Water District serves Box Springs, Eagle Valley, Lake Elsinore, Lee Lake, Temecula, and portions of Riverside and Corona.

³³ Rancho California Water District is a special water district serving approximately 150,000 people in Temecula, Murieta, and unincorporated areas of Riverside County.

funding. The municipal electric providers that partnered with SoCalGas in PY2021 include:

- Anaheim Public Utilities³⁴
- Pasadena Water and Power³⁵

Municipal Utility	Number of Units Served
Anaheim Public Utilities	709
Pasadena Water and Power	36
Total	745

Due to the pandemic and other factors, the partnership with Los Angeles Department of Water and Power (LADWP) did not continue in 2021, and the partnership with Riverside Public Utilities (RPU) was dormant in 2021.

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

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

In PY2021, SoCalGas’s collaborative efforts with Anaheim Public Utilities, and Pasadena Water and Power created leveraging opportunities that provided comprehensive energy savings to the joint customers of the

³⁴ Anaheim Public Utilities – delivers electricity to the city of Anaheim’s 345,000 residents and more than 15,000 businesses

³⁵ Pasadena Water & Power (“PWP”) – provides electricity to more than 65,000 customers within the city Pasadena. PWP also deliver water to almost 38,000 households and businesses in Pasadena and adjacent communities in the San Gabriel Valley

respective municipal electric providers. The added benefits of working together included the addition of water saving devices, leveraging combined marketing materials and focused efforts on high potential customers including those in disadvantaged communities. The preference of customers to participate in programs that provide water, electric and natural gas measures at the same time contribute to higher participation rates and greater customer satisfaction. The joint efforts reduce the touch points per customer which traditionally cause disruption for customers, and the combined efforts minimize administrative burden and cost inefficiencies.

Additionally, leveraging with water utilities and districts to offer HE clothes washers provides up to 8,000 gallons per washer per year savings. HE clothes washer costs may otherwise limit low-income customers from realizing the water and energy savings, and the leveraging of the ESA Program with other water utilities that do not have direct install programs for HE clothes washers provides an opportunity to reach low-income customers that would otherwise not be able to fund the difference between the appliance cost and available water utility rebate offers. This demonstrates SoCalGas's support for statewide conservation efforts.

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

SoCalGas entered into a multi-year agreement with the Department of Community Services and Development (CSD) in 2019 to leverage ESA

Program funds with CSD's Low Income Weatherization Program for multifamily properties (MF LIWP). Differences in customer eligibility and verification requirements and the types of measures offered by LIWP and the ESA Program presented challenges in finding candidates for leveraging. Both parties will continue to work together to identify feasible leveraging opportunities.

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

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

In PY2021, SoCalGas entered into a new partnership agreement with Rancho California Water District (RCWD) in which RCWD provides co-funding of water measures delivered through the ESA Program. In December 2021, SoCalGas and Metropolitan Water District (MWD) expanded their partnership agreement to include cold water measures such as premium efficiency toilets, smart irrigation controllers and smart hose bib controllers delivered to ESA Program customers in their overlapping territories at no cost. These cold-water measures are funded in their entirety by MWD.

1.6 Integration Success

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

In 2021, SoCalGas continued to employ data sharing, Integrated Voice Recognition (IVR), Customer Contact Center (CCC), and others as noted below, to connect the Low-Income Programs.

Data Sharing: In an on-going effort to eliminate barriers to participation in its assistance programs, and increase customer satisfaction, SoCalGas's CARE and ESA Programs continued to share enrollment data. New CARE-eligible ESA Program customers were enrolled for the CARE discount and automatically PEV approved if their income eligibility was verified by the ESA Program. CARE customers who had not participated in the ESA Program were referred for enrollment.

Integrated Voice Recognition (IVR): Multi-lingual messages regarding the CARE and ESA Programs are made available on SoCalGas's main call center IVR system. While on hold to speak to a Customer Service Representative (CSR), customers hear an automated message regarding Customer Assistance Programs including: CARE, ESA Program, and MBL. This message is also reinforced by live CSRs when customers call to establish service or make bill payment arrangements. CSRs initiate conversation about the CARE program and take applications over the phone during these specific calls. Additionally, a separate IVR phone number is printed on self-certification and recertification CARE

applications. Through the IVR, customers can follow the prompts in either English or Spanish and respond verbally or through push-button on their phone, to enroll in CARE or recertify their eligibility.

Branch Payment Offices (BPO): ESA Program and CARE information is displayed and available at SoCalGas BPOs. When income guidelines are updated each year, all branch offices receive new brochures, which are regularly replenished. BPO clerks are trained to promote both the CARE and ESA Programs.

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

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

Outreach by Field Employees: Field service employees continued to distribute CAP brochures to customers whenever it was necessary to enter a customer's home.

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

In PY2021, SoCalGas continued to serve low-income customers and property owners throughout its service area by delivering integrated program solutions via the successful Single-Point-of-Contact (SPOC) model. During PY2021, SoCalGas's SPOC team continued to navigate strict pandemic social distancing guidelines set forth by property owners and local government. Many property owners elected to postpone previously scheduled projects and/or were reluctant to allow utility contractors to perform upgrades, opting for safety rather than energy efficiency.

The SoCalGas SPOC team shifted focus during PY2021 towards promoting ESA Program Multifamily (MF) Common Area Measures

(CAM) and Energy Efficiency central plant retrofit projects to minimize in-person contact with tenants and on-site personnel.

Relationship Management is the key to SoCalGas's success in providing property owners with the best energy savings solutions and providing a steady 'pipeline' of project that participate in the various programs.

Governor Newsom's 'Project Homekey' initiative helped boost participation. This initiative allows multifamily property owners to convert existing motels into dwellings for the homeless. The SPOC team was able to engage nine (9) affordable ownership groups serving Project Homekey project sites: National Core, LA Family Housing (LAFH), The People Concern (City of LA), Housing Association County of Los Angeles (HACLA), Jamboree Housing, People Assisting the Homeless (PATH), Mercy House, Volunteers of America-LA and Weingart Center Association. These ownership groups possess 37 known sites totaling over 3,100 units.

The SPOC team continued to collaborate with assigned ESA Program contractors in delivering SoCalGas measures within affordable units. The SPOCs adapted to remote work and virtual office environments, thus allowing program participation to move forward and assist property owners in savings energy, while providing health, safety, and comfort for low-income tenants.

The SPOCs continue to expand their cross-portfolio work with numerous large affordable housing portfolios by presenting cross-portfolio energy and water efficiency recommendations to housing portfolios, representing over 900 total properties with over 75,000 total affordable units. For example:

- ESA CAM continues to deliver energy savings along with health, safety and comfort that enhance and improve the lives for low-income tenants and property ownership. The SPOCs ability to be the lead in identifying and enrolling these projects is the forefront of making this program successful.
- The SPOC team also coordinated and provided project leads for Energy Efficiency Whole Building program, and Multifamily Energy Efficiency Rebates (MFEER) program. These projects delivered incentives to provide increased energy savings equipment. Examples include:
 - The Energy Efficiency Whole Building Program completed an upgrade to the domestic hot water boilers for a project in Pasadena - a 148-unit senior housing high-rise. The program assisted the project by providing incentives totaling over \$100,000.³⁶
 - Multifamily Energy Efficiency Rebates (MFEER) issued for 140 tankless water heaters with total incentive over \$165,000.³⁷
 - A CAM Project in Rancho Cucamonga was recognized with the “21 Green Business Recognition Award.”
 - Through continued collaboration with the Southern California Association of Non-Profit Housing (SCANPH) organization, SoCalGas programs and services were incorporated into member newsletter and available via a virtual annual affordable housing conference.

³⁶ Energy Efficiency Residential Whole Building Program ID 3705 at <http://cedars.sound-data.com>.

³⁷ Energy Efficiency Program ID 3702 at <http://cedars.sound-data.com>.

- SPOC team continued to work closely with SoCalGas contractor and Owner Facilities teams to conduct Virtual Site Assessments/Audits at several property locations.

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

SoCalGas also provided relevant ESA Program information to Local Government Partnerships Program managers for distribution virtually to partners. Customer Assistance Programs Outreach presented to the San Gabriel Valley Council of Governments in October and provided attendees with materials on Customer Assistance Programs.

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

As part of the SPOC model and ESA Program MF strategy, SoCalGas's ESA Program expanded its outreach to MF building owners and managers to gain connections within the non-profit affordable housing marketplace. Additionally, the SoCalGas SPOCs have been receiving a steady stream of customer referrals from organizations who have been previously served. A key element of the process was to explore how to better coordinate with "Deed Restricted" properties through the California Tax Credit Allocation Committee (TCAC). TCAC administers the federal and state Low-Income Housing Tax Credit Programs. This coordination is important as deed restricted CAM participation is required per the D.16-11-022.³⁸

³⁸ D.16-11-022, p. 193.

Additionally, the ESA Program continued to work closely with SoCalGas's Energy Efficiency team, using the SPOC model to refine communication and coordination strategy. The objective is to ensure that customers, particularly multifamily property owners, receive comprehensive services and incentives regardless of the customers' income qualification by communicating low-income and energy efficiency program options.

SoCalGas SPOC Account Executive (AE) team's fundamental role is to provide affordable multifamily property owners with fully integrated, energy savings opportunities. The SPOC team also coordinates and integrates other IOU/Municipality and Water provider programs.

SoCalGas simplified the process by removing challenges and barriers for the property owners that might otherwise discourage busy owners/facility teams and property management stakeholders from participating in utility programs/services.

Traditionally these property owners tend to participate in ESA In-unit and CAM direct install measures, which are no-cost to the owner. To better serve our MF market segment partners, SoCalGas SPOC AE team has evolved its role. The AE team also offers support for several additional programs and services such as, CARE, Financing, Solar Thermal, and Energy Efficiency Multifamily Whole Building. SoCalGas SPOCs have also facilitated other SoCalGas services to provide a high level of service

and build rapport with owner requests on a range of property and/or project. These services include Field Planning services, new/upgrades to gas service and meter sets. SoCalGas assists property owners with connections to electric/water saving programs which can reduce operating costs and improve the owners' bottom-line by incorporating measures such as ceiling fans, refrigerators, windows, toilets and turf removal.

SoCalGas SPOC team continually looks for opportunities to 'layer-on' energy-saving measures via Energy Efficiency program offerings. This coordination allows SoCalGas to provide rebates, incentives and/or direct installation measures which can deliver additional energy savings.

The SoCalGas SPOC team's cross-portfolio approach and intimate knowledge of its customer's entire property portfolio enables the SPOC to quickly pivot ESA Program projects to the Energy Efficiency team to incentivize or rebate projects that do not qualify for ESA Programs.

SoCalGas continues to refine its data collection/tracking systems, cross-departmental communication and coordination strategies with the objective to ensure that customers receive comprehensive services and incentives regardless of income qualifications.

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

This section is not applicable to SoCalGas.

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

As part of the California Solar Initiative (CSI) Thermal Program, SoCalGas offered solar water heating rebates of up to \$2,509 for low-income single-family homeowners. In 2021, SoCalGas processed 48 single family applications for low-income customers, totaling \$120,432 in incentives and equating to 3,256 in expected therms saved annually.

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

This section is not applicable to SoCalGas.

1.7 Workforce Education & Training

1.7.1 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.

In 2021, SoCalGas continued to promote the growth of a trained workforce and implemented changes to focus on inclusion and to apply a more direct approach than in previous years to expand the employee pool for contractors and promote contractor expansion. SoCalGas continued the policy of eliminating the aptitude test that candidates were previously required to pass prior to attending E&A training. Instead, SoCalGas relied on its contractors to pre-screen and hire candidates they believe would be successful in performing ESA Program enrollment services. SoCalGas also reviewed its initial assessment requirements and removed redundant tasks from Program Representatives that ultimately were the installer's responsibility. For example, the task of performing Combustion &

Ventilation Air (CVA) calculations in the home for infiltration measures was determined to no longer be necessary at the time of enrollment, as this task is performed by the installer, and was removed from the Program Representative's E&A duties to perform. Previously, SoCalGas had also removed the HE Clothes Washer assessment from the Program Representative's E&A duties as this activity was also considered the measure installer's responsibility. Removing these technical requirements allowed for a larger pool of candidates to enroll and successfully pass the enrollment and assessment training. In addition, eliminating the need to train in these more technical modules has streamlined the E&A training curriculum.

Another change in training that supported expanding the employee pool for contractors was implementing the ability for contractors to provide their own training to canvassers and telemarketers. The SoCalGas-developed curriculum was provided to contractors for their use when hiring canvassers who do not enter customers' homes or telemarketers who seek customer interest via a live person call. SoCalGas made this training platform available to all contractors online to ensure a contractor's comfort level and training expectations are met.

The most fundamental change that SoCalGas has recently introduced in the workforce and education space was the introduction and maintenance

of fully online training and testing platforms. For the past two years SoCalGas has utilized a training platform that allows contractors to continue sending prospective Program Representatives to train on SoCalGas's E&A policies and procedures to be prepared to enroll eligible customers into the ESA Program. SoCalGas procured an online training platform that is user-friendly for prospective Program Representatives and can be managed across all levels of electronic device expertise. SoCalGas's platform allows for learning modules to be easily updated to accommodate program policy and procedure changes, accepts various forms of multi-media resources, and possesses the ability to store data for retrieval later. SoCalGas's online curriculum is based on the curriculum that was most recently taught in-person and allows prospective Program Representatives to study at their own pace and in locations and times that best suit their needs. The testing platform deployed by SoCalGas offers valuable resources to design, develop, and administer testing to an increased number of candidates in a wholly virtual setting. The online testing process allowed SoCalGas to conduct bi-weekly E&A testing to 341 candidates in 28 sessions throughout the year. Developing and implementing the fully online training and testing platforms that convey all the necessary policies and procedures to prospective Program Representatives in a safe and convenient online format has allowed for a steady pace of Program Representatives to onboard throughout the year.

As part of the ongoing effort to promote and develop its contractor workforce, SoCalGas continued its partnership with Southern California Edison (SCE) to jointly offer their respective contractor networks access to a Computer Based Training Learning (CBTL) system. The CBTL system offers e-learning education in which students learn by executing special training programs on a computer. The CBTL is especially effective for training people to use computer applications because the CBTL program can be integrated with the applications allowing students to practice using the applications as they learn. Students can browse catalog topics which include the entire Microsoft Office suite, Apple Learning, and other additional software programs. This type of training is convenient in that students may enroll and take the courses at their own pace and convenience. As part of SoCalGas's effort to expand the use of the CBTL system within its contractor network the CBTL was made available to all contractor service types and all contractor personnel both in the office and in the field.

In PY2021, SoCalGas continued discussions with the IOUs to explore joint online training, specifically joint E&A and In-Home Energy Education. SoCalGas discussed with San Diego Gas & Electric (SDG&E) and SCE the possibility of leveraging resources to establish a joint platform for the delivery of online training. Conversations on this coordinated effort continue.

SoCalGas continually looks for ways to improve the delivery of its training. In PY2021, SoCalGas refined a Frequently Asked Questions (FAQs) sheet which can be referred to for commonly asked questions. In addition to the FAQ sheet, SoCalGas sent out a link that contains all the applicable information regarding the self-driven learning modules and reference guides. Furthermore, SoCalGas periodically solicited feedback from its contractor network to assist in developing and streamlining any new processes.

SoCalGas utilizes CBOs and private contractors to provide program services, including E&A, Heating Ventilation and Air Conditioning (HVAC), weatherization, and inspection services. SoCalGas tracks its contractors to ensure that they hire from the communities they serve and documents the home ZIP code for each E&A Program Representative candidate that attends E&A training. SoCalGas used this information to determine the number of candidates from Disadvantaged Communities (DACs) to continue to encourage contractors to hire from these communities within their service territories.

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

In PY2021, SoCalGas continued to provide various training courses including initial E&A, In-Home Energy Education, Natural Gas Appliance Testing (NGAT), several refresher invoicing trainings, Home Energy Assistance Tracking (HEAT) System, and ESA Program Mobile site

training. These are all designed to provide thorough policy interpretation and general technical training to its ESA Program workforce. While all training courses convey the importance of the utility-specific requirements and expectations for customer interactions with participants, each course also supports the development of expert ESA Program knowledge at all levels and stages, from front line to back office, and from newly hired to tenured personnel. SoCalGas requires contractors to ensure their employees conform to contract and industry standards indicative of the jobs and duties they must perform. ESA Program services, including assessment, enrollment, installation of measures, repair and replacement of appliances and inspections are all provided by third party contractors. Thus, the students attending these training classes are hired by the ESA Program contractor network.

Potential Program Representatives who will perform enrollment and home assessment as well as provide In-Home Energy Education must successfully pass the required SoCalGas training and the Department of Justice background check. The online training covers utility-specific items related to policies, security processes, and overall customer service standards, as well as leveraging opportunities among other low-income programs, and the EE module. A final exam must be passed and candidates who enroll in-person must be issued an active HISR license

from the California State Licensing Board before being eligible to receive a SoCalGas badge.

SoCalGas Field Operations training typically includes initial in-person training for new participants in weatherization, inspections, HVAC and NGAT as well as refresher training for existing ESA Program personnel. These trainings are all designed to provide comprehensive policy and procedure training to its ESA Program workforce. However, due to COVID-19 pandemic restrictions, SoCalGas temporarily continued its suspension of its yearly refresher training, instead offering virtual training only to new participants entering the program. SoCalGas Field Operations moved all initial training in weatherization, HVAC, and inspection services to a virtual video conferencing format. This virtual training format was offered to all new employees and continued throughout the year. Field Operations conducted 24 classes and 138 installers were trained.

In an effort to improve program delivery, SoCalGas provides its E&A contractors back-office support and processing staff virtual training through Enrollment Workshops offered throughout the year. These sessions address important program updates, provide an overview of new program requirements, and serve as a general refresher course for all participants. SoCalGas designed these workshops to improve the

participants' understanding of the enrollment process and customer enrollment requirements. In addition to the E&A training, SoCalGas provides its entire contractor network invoicing back-office training. This training covers data entry, processing, and invoicing of customer enrollments in the program's database system and is offered to both new personnel and tenured employees to provide consistency and reduce data entry errors in the system.

To ensure safety, SoCalGas continued virtual contractor training to continue addressing specific issues affecting contractors back-office personnel. SoCalGas worked closely with contractor back-office personnel by providing one-on-one support which enabled SoCalGas to better understand the challenges back-office personnel face and provide solutions to these challenges. The training curriculum helped SoCalGas better assess contractor needs and assisted in tailoring trainings provided by SoCalGas to support the growth and development of the contractor workforce. In addition, SoCalGas developed a robust and comprehensive Reference Guide as a leave-behind after each invoicing training session. In 2021, SoCalGas hosted 23 virtual invoicing trainings, including hands-on sessions where contractors shared their screens so SoCalGas could provide real-time, personalized feedback.

1.7.3 For the ESA Program – Provide the following metrics related to WE&T in support of Commission’s effort to increase workforce opportunities for workers in disadvantaged areas.

Percent of incentive dollars spent of contracts with a demonstrated commitment to provide career pathways to disadvantages workers.

This metric has not been a requirement for SoCalGas’s existing contractors; therefore, data is not available for 2021.

Number of Community Workforce Resources (CWR) participants who have been employed for 12 months after receiving the training (provide contractors early warning of need for this information).

The statewide Career and Workforce Readiness (CWR) program is a component of the Energy Efficiency program and was launched in late 2021, therefore, SoCalGas is not able to provide data on the number of participants have been employed for 12 months after receiving the training.

Percent of total WE&T training program participants that meet the definition of disadvantaged worker.

This metric has not been a requirement for SoCalGas’s ESA Program contractors; therefore, data is not available for 2021.

1.8 Studies

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

The table below provides an overview of the ESA Program/CARE Studies that SoCalGas and/or the IOUs conducted in 2021. Budgets associated

with these authorized studies are provided in ESA Program Table 15 – Expenditures for Pilots and Studies.

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion
2020 Non-Energy Benefits (NEBs) Follow-up Study	APPRISE	SDG&E	Apr 2020	Feb 2021
2022 Low Income Needs Assessment	Evergreen Economics	SCE	Jan 2021	Dec 2022
MF-CAM Process Evaluation	Resource Innovations	PG&E	Aug 2021	Jun 2022
CHANGES Evaluation	Opinion Dynamics	PG&E	Sep 2021	Oct 2022

2020 Non-Energy Benefits (NEBs) Follow-up Study

In April 2020, SDG&E, on behalf of the four IOUs, contracted with APPRISE Inc. to assess the results of the 2019 Non-Energy Benefits (NEBs) Study. The scope of work which was approved by Energy Division (ED) in 2019 also included tasks to improve the calculations and allocation method to the extent possible without additional research, and to create a simplified Excel tool that the IOUs could use to calculate the benefits. This project was co-funded among the four IOUs using the Rapid Feedback and Analysis budget.

Primary study objectives were to 1) review and assess the 46 NEBs from the 2019 Skumatz Navigant Study; 2) review and assess the 2019 Study's proposed allocation of NEBs to program measures; 3) improve the NEB calculations and allocation method to the extent possible without additional research; 4) provide a simplified Excel-based tool for estimating the NEBs; and 5) document the results in a written report.

The study successfully addressed all of the objectives. The final report documented reasons for either including or omitting each of the 46 proposed NEBs from the 2019 Study. For the NEBs that remained, data sources and calculations were updated and improved. The results of this study reduced uncertainty in the NEB calculations, verified and in some cases improved the data sources, recommended a simplified measure allocation method, and created a simplified Excel tool. It is important to recognize, however, that the NEB values remain imprecise estimates and additional primary research is recommended. For example, some of the inputs taken from secondary data are still from older studies of programs not fully representative of California's climate and program offerings. In addition, many of the NEBs are estimated as a function of average energy bill savings. While it may not be ideal for NEB estimates to be dependent on savings, alternate methods were not available at this time.

In January 2021, the IOUs hosted a public workshop to present the study's methodology and findings. A draft report of the study was posted in December 2020 to solicit stakeholder feedback, and a final report incorporating stakeholder comments was posted in February 2021.³⁹

³⁹ APPRISE Inc., *California Energy Savings Assistance Program Non-Energy Benefits Final Report*, (January 2021), available at: https://pda.energydataweb.com/api/view/2471/Final%20CA%20ESA%20NEB%20Report%201-25-21_.pdf.

2022 Low Income Needs Assessment (LINA) Study⁴⁰

Work for the 2022 LINA commenced in January 2021 with Evergreen Economics as the selected consultant. To achieve the study's primary objective of identifying renter needs in the ESA Program, a large-scale phone survey (n=1,200) of the California income-qualified renter population is being conducted to create different renter profiles.

Combined with other data analyses, the collected information is intended to inform program and policy recommendations to address the unique characteristics of income-qualified renter households.

A public workshop was held in March 2021 to present the draft research plan and solicit public comments, before they were incorporated to produce the final research plan. The consultant then began planning for quantitative and qualitative data collection. In May 2021, in-depth interviews were conducted with ten CBOs and ESA Program contractors who served income-qualified households, including those with non-English and non-Spanish speaking cultures and backgrounds. Interview results were used to inform the design of the upcoming renter phone survey, and a data analysis plan was also developed in July 2021 to map planned survey responses to study objectives documented in the research plan.

⁴⁰ The LINA Study is mandated to be completed every three years per AB 327 and PUC Sec. 382(d).

In August 2021, a preliminary market characterization of California's income-qualified population was constructed using utility customer data and secondary data sources, which will be updated with data from the latest 2019 California Residential Appliance Saturation Study (RASS) and published in 2022. From September to October 2021, the study consultant drafted the renter phone survey instrument for the study team's review, which then went through multiple reviews and revisions to ensure that survey responses would adequately address the study's research objectives.

The phone survey was launched in November 2021 across the IOU territories, but participation rates were lower than expected. To mitigate this issue, the study consultant sent out an advanced letter to pre-selected survey participants and provided customers with a \$25 gift card after survey completion. The incentive and revised outreach strategy proved to be effective and resulted in a steady uptake in survey completions. The study is on track to be completed by December 2022.

MF CAM Process Evaluation

A process evaluation for the MF CAM Initiative commenced in July 2021 with Resource Innovations, Inc. as the selected consultant. The study has the following objectives: 1) assess the relative effectiveness of current MF-CAM outreach, delivery, and implementation strategies; 2) identify

what data currently exist and may be needed to facilitate more reliable evaluations of program impacts; 3) inform future program designs targeting the income-qualified MF sector.

The first stakeholder workshop was held in September 2021 to present the draft research plan and solicit feedback from stakeholders. Comments were incorporated to produce the final research plan, which was posted publicly along with comment responses.⁴¹ From October to November 2021, program data review as part of the process evaluation continued, and the study consultant conducted interviews with IOU program administrators, implementers, and the SPOC representatives to inform evaluation findings and program process improvements.

In December 2021, the study consultant produced revised process flow diagrams and created first drafts of the program logic models, along with an interim findings memo. The second stakeholder public workshop is scheduled for February 2022 to share interim findings⁴² and gather feedback from stakeholders midway through the project. The remaining tasks for the process evaluation include participant surveys and in-depth interviews, CPUC and tenant interviews, creating customer journey maps,

⁴¹ California Energy Efficiency Energy Contracts, *RESA MF-CAM Process Evaluation – Final Research Plan* (September 2021), available at: <https://pda.energydataweb.com/#!/documents/2534/view>.

⁴² California Energy Efficiency Energy Contracts, *MF-CAM Process Evaluation - Draft Interim Findings Memo* (January 24, 2022) available at: <https://pda.energydataweb.com/#!/documents/2578/view>.

and identifying data collection needs to support the recommended impact evaluation approach. The study is expected to be completed by June 2022, following a third stakeholder workshop to present overall study findings and the publication of a final report.

Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Evaluation

The CHANGES program was established as a pilot in 2011 to provide in-language energy-related (electric and natural gas) outreach, education, and resolution of needs and disputes, to limited-English proficient (LEP) consumers residing in the four IOU territories.⁴³

Per Decisions 15-12-047 and 21-06-015, the program is subject to regular evaluations. The framework of the evaluation will have the following objectives: 1) assess overall performance associated with anticipated needs of the target population: This includes an examination of who is served, how relevant/sensitive the program is to their needs, and the relative benefits of each of the four functional areas: outreach activities, educational activities, needs assistance activities and dispute resolution activities in serving the needs of the population; 2) identify the extent to which current data collection support an understanding of the program's effectiveness and ongoing reporting for success. If not, what data will be

⁴³ The Four IOUs include: Pacific Gas and Electric (PG&E), Southern California Edison (SCE), Southern California Gas (SCG) and San Diego Gas & Electric (SDG&E).

needed to do so; 3) examine net benefits of program in comparison to similar programs/services operated by IOUs or other entities across the US; 4) document how the budget and program costs are allocated across services or functional areas, the extent to which the budget is appropriate, and the appropriateness of the funding source in relation to addressing the primary customer needs supported by CHANGES; 5) examine the operational effectiveness of the administration of the program. In particular, assess the effectiveness of the contractor's role and management of the Program, and identify potential ways to refine and improve the delivery and management structure of the services CHANGES seeks to provide.

The IOUs and ED finalized the scope of work for the Request for Proposal in September 2021. Pacific Gas and Electric (PG&E) as the lead IOU of the project, conducted a competitive bidding process where Opinion Dynamics was selected in December 2021. Opinion Dynamics held a kickoff meeting in March 2022 and is working on the first task of drafting the Research Plan. The project is scheduled to be completed in October 2022.

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

(1) The "2020 Non-Energy Benefits (NEBs) Follow-up Study". See section 1.8.1; (2) See ESA Program Table 15 for 2021 study budgets and expenditures. (3) and (4) See final report: APPRISE Inc., California

Energy Savings Assistance Program Non-Energy Benefits Final Report

via the link below:

https://pda.energydataweb.com/api/view/2471/Final%20CA%20ESA%20NEB%20Report%201-25-21_.pdf

1.9 Pilots

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

There were no Pilots in 2021.

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

There were no Pilots completed in 2021.

1.10 “Add Back” Measures

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

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

The inclusion of “add-backs” in PY2021 treated homes did not impact SoCalGas’s ability to reach customers or to install measures. Add-back measures were those that were not included in SoCalGas’s proposed budgets because they fell short of the adopted cost effectiveness threshold,

then later were “added back” as part of the budget decision. For the 2017-2020 cycle, D.16-11-022 provided the opportunity to adjust budgets to accommodate ordered changes to the measure portfolio, including the retention of the duct sealing weatherization measure. Budgets for all current measures including add-backs were requested in SoCalGas’s application and conforming Advice Letters and approved in D.16-11-022 and Resolution G-3532; thus, add-backs will not impact SoCalGas’s ability to treat homes or install measures going forward.

1.11 Low Income Working Groups

ESA Program Working Group

Formation of the Energy Savings Assistance Program Working Group (ESA WG) was directed in D.21-06-015.⁴⁴ Responsibilities of the ESA WG include updating ESA Program Policy and Procedures and Installation Manuals, recommending program revisions including updates to ESA Program measures, reviewing cost effectiveness test considerations, making changes to ESA Program goals as necessary, and exploring potential development of a Universal Application System (UAS).

We approve the formation of the ESA WG and add to this group’s role work areas including but not limited to all mid cycle issues, energy education, multifamily, and the UAS work directed in this decision.

Consistent with the formation of the ESA Program/CARE Study Working Group, membership shall comprise of the IOUs’ representatives, Energy

⁴⁴ D.21-06-015, p. 413

Division staff, and no more than two representatives from each segment of the following interest groups: contractors, CBOs, Cal Advocates, consumer protection/advocates, and other special interest groups (as applicable to the subject and agreed to by the previously indicated members). Representatives shall have expertise in the issues relating to the working group's purpose and tasks and are expected to contribute significantly to the progress and resolution of the tasks; those that do not may be removed or replaced. We note that the working group representatives do not have to always be the same people as they can be interchanged based on the subject matter and level of expertise. However, we require the working group to adhere to the number of allowed representatives from each party/segment to ensure that the size of the group is manageable for the deliverables expected. Too large of a group may hinder such progress. In convening the working group, the IOUs are encouraged to consider the California Energy Efficiency Coordinating Committee (CAEECC) rules and processes, where applicable. The ESA WG will begin meeting at least once a quarter, starting no later than the beginning of 2022.⁴⁵

The ESA WG is consensus-based and managed by the IOUs through their hired facilitator. The ESA WG will be responsible for providing greater transparency of ESA Program technical issues, updating the Statewide ESA Program Policies

⁴⁵ *Id.*

and Procedures Manual and the Statewide ESA Program Installation Standards Manual, and recommending program revisions or changes to program goals as necessary. The ESA WG is also tasked to discuss and make recommendations regarding the potential design and development of a Universal Application System (UAS) allowing multiple registration pathways for CARE/FERA/ESA Program, the sharing of application information, and the sharing of energy usage information. Finally, the ESA WG is tasked to evaluate and provide recommendations on how to increase overall program cost effectiveness as well as help facilitate the non-energy benefit (NEB) study plan process for the other Working Group directed by D.21-06-015, the ESA/CARE Studies Working Group.

In 2021, PG&E worked with Energy Division and the other IOUs to establish the ESA WG. On November 10, 2021, PG&E sent an email to the A.19-11-003 et al. service list soliciting WG members. ESA WG members were selected in early December and an informal orientation meeting was held on December 17, 2021, with a Kick-off Meeting held on January 20, 2022.

UAS Sub-Working Group

D.21-06-015 directed the IOUs to set up a UAS Sub-Working Group (SWG), as part of the overall ESA WG to explore the feasibility of streamlining application processes for multiple IOU and non-IOU programs targeting income-qualified

customers.⁴⁶ The UAS SWG is tasked to report its recommendations to Energy Division by July 1, 2022.⁴⁷ Led by SoCalGas, the IOUs⁴⁸ and Energy Division held a UAS SWG kick-off meeting on December 7, 2021. The meeting also included participants from multiple community-based organizations, and representatives from the California Air Resources Board (CARB) and the California Department of Community Services and Development (CSD). The meeting covered topics including the UAS SWG charter and scope, and a UAS monthly timeline. The PowerPoint presentations and all other UAS Working Group documents can be found at <https://pda.energydataweb.com>.

ESA & CARE Programs Studies Working Group

Decision 21-06-015 authorized the formation of a statewide Study Working Group for the ESA and CARE Programs.⁴⁹ The Group's responsibilities include the following tasks for statewide non-statutory studies: assign a lead IOU for each study; develop and provide feedback on proposed scopes, budgets, timelines, statements of work, and other study scoping documents before finalized for study execution; participate in project kick-offs and attend project check-in meetings as needed; and provide feedback on project milestones and draft study results as requested by lead IOU in a timely manner.

⁴⁶ *Id.*, p.130

⁴⁷ *Id.*, p.481, OP 46.

⁴⁸ The IOUs are: PG&E, Southern California Gas Company (SoCalGas), San Diego Gas and Electric Company (SDG&E), and Southern California Edison (SCE).

⁴⁹ D.21-06-015, p.410.

On August 16, 2021, SDG&E, on behalf of the IOUs, noticed the low-income service list requesting parties interested in joining the Working Group to respond with a letter of interest. Two parties responded. The Working Group held its initial meeting on October 21, 2021, with attendees from the two interested parties, the four IOUs and Energy Division. Subsequently, additional stakeholder members were recruited and joined the Group. The Working Group met again on November 17 and December 17. Topics discussed during the first three meetings included an overview of studies planned for the 2021 – 2026 program cycle; work scope and timeline for the Categorical Eligibility Study; and overview of the SCE Clean Energy Homes pilot.

1.12 Annual Public ESA Program and CARE Meeting

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

Additionally, IOUs were directed to use these meetings as a forum to host the working groups.

In compliance with D.12-08-044, SoCalGas and the IOUs held a webinar meeting on June 30, 2021. There the IOUs presented an overview of their 2020 CARE and ESA Programs results.

1.13 Multifamily Properties

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

SoCalGas's 2018 Annual Report results informed a subsequent analysis to scrub the data from SoCalGas's Customer Information System (CIS) and apply the poverty percentile from CalEnviroScreen 3.0 to the total of 73,638 bill accounts serving MF properties. The result yielded 18,318 properties that can be identified as potentially MF low-income non-deed restricted. This result includes all eligible and non-eligible properties for MF common area measures in the ESA Program. However, SoCalGas has not been able to obtain a property data list from a third-party to verify deed or non-deed restricted properties within its service territory. SoCalGas was able to compare analysis method with SCE but found no common ground due to the lack of the original property data regarding property restriction. For this reason, SoCalGas reported only new consumption and ESA Program treated data from the list of 18,318 properties in the 2019 Annual Report. SoCalGas is also reporting the same type of data in this Annual Report.

Below are two summary tables showing the 2021 annual analysis of MF low-income non-deed restricted properties. This analysis required a multi-step process to analyze and evaluate the data, including as such: missing data, duplicate data, non-active/closed accounts, invalid/mismatched

information, or unable to be matched due to nonstandard address designations and aligning CIS with Geographic Information Service (GIS). Only data that were able to be matched and utilized for this analysis are provided below.

SoCalGas Multifamily Low-Income Non-Deed Restricted Property Analysis

Category	All MF Properties				Central Facility		Master Meter	
	Number of Properties	Avg Sq. Ft.	2021 Annual Therms ('000)	Therms per Property	2021 Annual Therms ('000)	Energy Use Intensity (Therm/Sq. Ft)	2021 Annual Therms ('000)	Energy Use Intensity (Therm/Sq. Ft)
Has Sq. Ft. Data	15,457	19,955	46,381	3,212	24,418	0.11	21,963	0.26
Sq. Ft. Data Missing	2,861	N/A	9,973	3,762	3,825	N/A	6,148	N/A
All properties	18,318	--	56,353	3,297	28,243	--	28,110	--

ESA Program Participation

Year Last Treated	# Properties Treated through ESA
2010	57
2011	89
2012	50
2013	78
2014	174
2015	132
2016	154
2017	287
2018	227
2019	487
2020	723
2021	579

The ESA Program Participation table above reflects the last retrofit performed at the property. Therefore, properties treated over multiple

years are counted only in the last year they were treated. For example, a property that was treated in 2015 and 2018 is counted once in 2018.

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

SoCalGas did not participate in any projects with the California Advanced Services Fund's Broadband Public Housing Account in 2021.

1.13.3 The IOUs conduct and report an annual normalized metered energy consumption analysis of the multifamily common area measure

Introduction / Key Findings and Recommendations

This report contains results and recommendations from the backcast of the SoCalGas's Energy Savings Assistance Program Multifamily Common Area Measures (ESA CAM) projects. This backcast analyzes six projects that were completed between June and December of 2020. In a backcast, Recurve, the consultant tasked with the analysis, assesses savings via a measurement of changes in normalized meter-based consumption (NMEC) that customers experienced after participation. The backcast analysis enables identification of important and actionable aspects of program outcomes, especially as these insights relate to meter-based performance. For this backcast, Recurve is using the CalTRACK 2.0 Daily and Hourly methods to measure the gas savings at each meter enrolled in the program. The meter-level results are aggregated to produce project and portfolio-level savings.

In SoCalGas's ESA CAM projects, customers receive upgraded boilers and water heaters. New systems are installed by a participating contractor.

Depending on the multifamily housing configuration, these systems may serve common areas that are separate from the housing units themselves or may also serve building tenants. Table 1 gives a summary of results.

Table 1: Backcast results by project

Project	Qualified Gas Meters	Predicted Usage (Therms)	Metered Savings (Therms)	% Savings	Fractional Savings Uncertainty
Sunset Heights/Alta Loma	5	3,658	468	12.8%	18.1%
Las Palmas	3	4,622	642	13.9%	93.5%
Robinson Villas	1	2,482	-187	-7.5%	37.8%
Durant	1	5,844	1,161	19.9%	11.0%
Mission Village	1	4,858	-2,510	-51.7%	14.1%
Vineyard	1	858	143	16.7%	30.0%
Total	12	22,322	-284	-1.3%	252.6%

Across the six projects, Recurve received data on 12 meters. The Durant project had the highest predicted usage of any site and saved 19.9%. The Sunset Heights/Alta Loma and Las Palmas projects accounted for most of the meters and these projects achieved 12.8% and 13.9% savings, respectively. The Mission Village project had savings of -51.7%; however, measured savings outside the range of 50 to -50% are typically caused by a non-routine event and may not be indicative of program performance (see section below details). For the six projects combined, Recurve calculates a negative 1.3% savings. Removing the Mission Village project, Recurve calculates 12.75% savings for the portfolio.

Recurve also analyzed savings by the combination of project and installed measure with results summarized in Table 2.

Table 2: Metered savings results by project and installed equipment

Project	Equipment Installed	Gas Meters	Metered Savings (Therms)	% Savings
Sunset Heights/Alta Loma	75-gallon WH	5	468	12.8%
Las Palmas	100-gallon, 0.199 MMBTU WH	2	728.92	17.1%
	40-gallon WH	1	-87.19	-24.1%
Robinson Villas	100-gallon, 0.199 MMBTU WH & 75-gallon, 0.074 MMBTU WH	1	-187.3	-7.5%
Durant	0.399 MMBTU WH	1	1,161	19.9%
Mission Village	0.399 MMBTU WH	1	-2,510	-51.7%

With only one or two projects in several of the measure groupings, it is difficult to draw any broad-based conclusions or recommendations about the performance of such installations. Vineyard is not included in Table 2 because no installed equipment was recorded for the project.

Methods and Data Summary

Recurve utilized the CalTRACK 2.0 Hourly methods and the OpenEEmeter open-source Python codebase to conduct all savings

calculations presented in this backcast.⁵⁰ The CalTRACK Hourly model is a Time-of-Week and Temperature (TOWT) model and operates using a temperature-binning scheme of up to seven distinct bins. The model is piecewise linear across the bins. The model is also weather normalized and toggles between occupancy states depending on hourly usage patterns. The CalTRACK Hourly methods are described in full detail at www.caltrack.org and are summarized in a recent article on Recurve's [website](#). In measuring savings, Recurve first establishes a model based on the 365 days leading up to program participation. This time period is known as the “baseline” period and the model as the “baseline” model. Recurve then projects this model into the 365-day period following program participation (the “reporting” period”) applying the temperature data of the reporting period. This model projection, known as the “counterfactual” represents the estimation of hourly energy usage that would have occurred in the absence of program intervention. The difference between this counterfactual and actual consumption is taken as the savings attributable to the program. This process is completed for each meter and results are aggregated as needed to analyze different segments of the population.

⁵⁰ The CalTRACK methods are based on industry guidelines established by The American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE Guideline 14) and the Uniform Methods Project (Chapter 8 - Whole Building Methods). The CalTRACK methods meet all International Performance Measurement and Verification Protocol (IPMVP Option C) requirements. CalTRACK represents the most detailed public specification of IPMVP Option C and includes rigorous steps for data cleaning and organization, weather station selection and weather normalization, and selection of specific model parameters for best fit to the raw consumption data.

Out of scope for this work is an adjustment for the energy impacts of COVID-19 pandemic, though further comparison group analysis can be conducted as needed.⁵¹

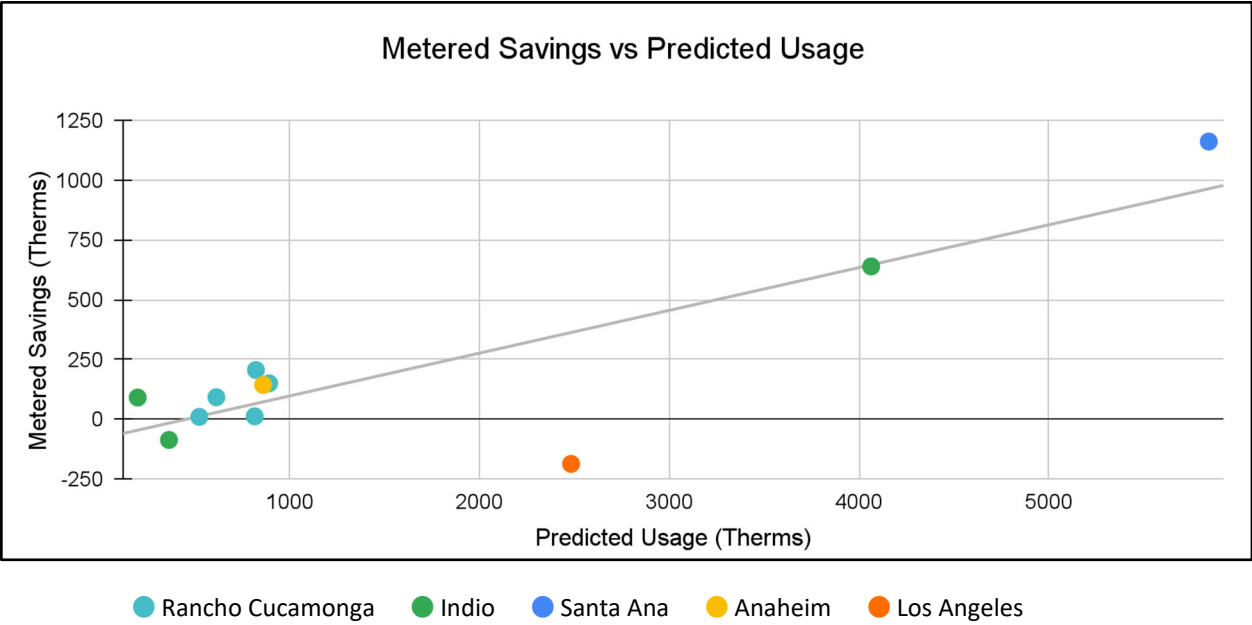
Recurve traditionally removes meters with less than 328 days of data in either the baseline or reporting periods or that had very poor model fit (coefficient of variation of the root-mean-squared error or CVRMSE of the CalTRACK daily model above 1.0). Recurve also traditionally removes outliers, defined as any meter with more than 50 MWh annual consumption or that experienced savings outside the range of -50 to 50% of predicted consumption. While all meters are included in the results presented herein, 1 meter out of 12 had a CVRMSE > 1.0 and a separate meter had measured savings < -50%.

Additional Results

Figure 1 shows the savings results plotted against predicted usage for all meters in the portfolio, with the exception of the Riverside project meter that had outlier negative savings indicative of a non-routine event. As one would expect, there is a general upward trend in savings as a function of usage.

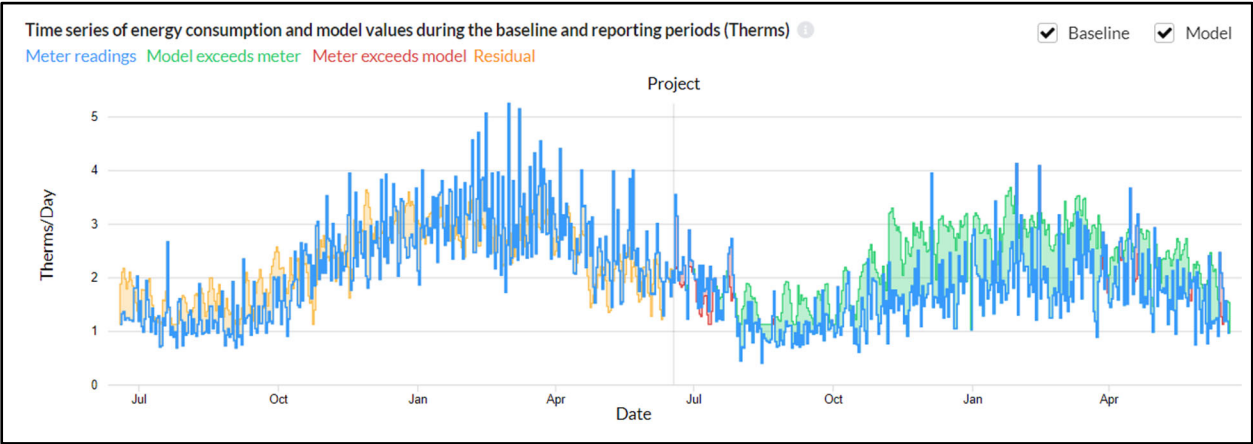
⁵¹ In order to isolate and remove COVID impacts from program impacts a comparison group analysis should be undertaken. Recurve recently developed open source methods and code (GRIDmeter) to automate comparison group selection and analysis. See: <https://gridmeter.recurve.com/methods.html>

Figure 1: Savings vs. Predicted Usage for ESA CAM projects



For each of the projects Recurve has provided SoCalGas a breakdown of individual meter performance through the Recurve Platform. An example meter from the Sunset Heights/Alta Loma project is shown below in Figure 2. This figure shows the baseline and reporting observed meter trace (blue) as well as the baseline model (orange) and counterfactual (green/red) for a meter in the Las Palmas portfolio.

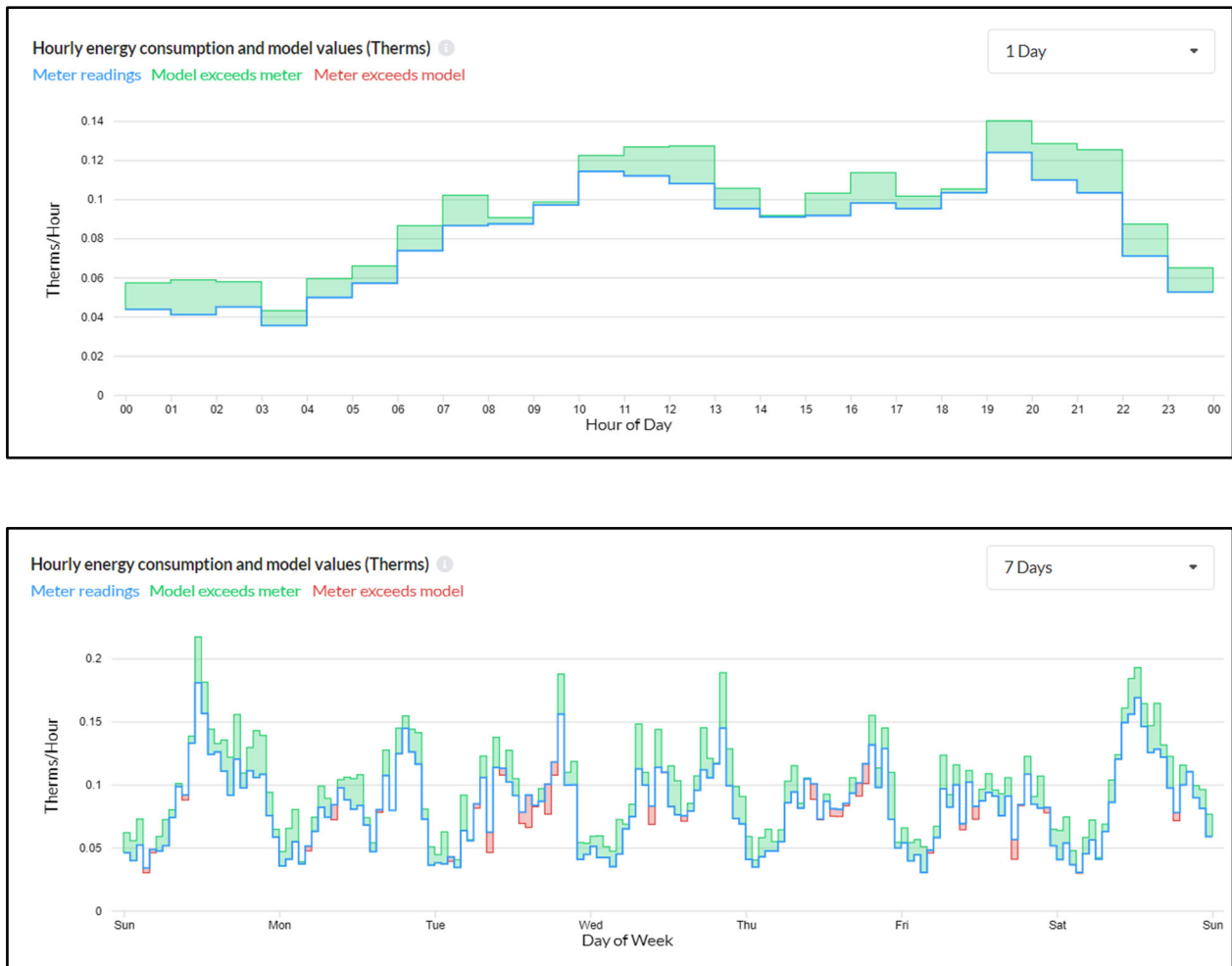
Figure 2: Baseline and reporting period usage (blue), baseline model (orange) and counterfactual (green/red) for a meter in the Rancho Cucamonga portfolio.



Recurve observes that this meter saved 25% and that those savings were produced primarily in the winter and shoulder seasons.

Figure 3 shows the average daily and weekly hourly load shape for this meter along with the savings profile.

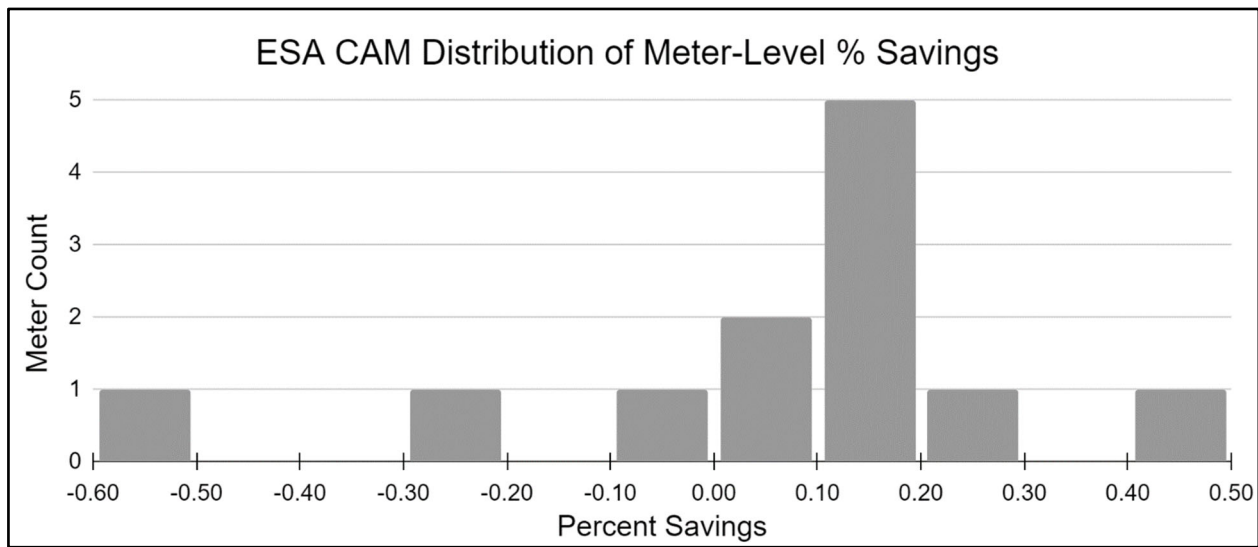
Figure 3: Average daily (top) and weekly (bottom) hourly therms load shape for a meter in the Rancho Cucamonga portfolio. Reporting period usage is shown in blue and the counterfactual in green/red.



As mentioned, this level of information is available for each meter in the portfolio via the Recurve Platform.

Figure 4 shows the distribution of metered savings on a percentage basis for all meters measured in this backcast. This figure shows that most meters achieved positive savings while a couple meters in the portfolio exhibited a strong increase in consumption, which led to large negative savings. With more meters in this portfolio statistics would improve, and a few outliers would not have a significant impact on the portfolio.

Figure 4: Distribution of % savings for all meters in the ESA CAM Portfolio



Fractional Savings Uncertainty and CVRMSE

Along with savings, the Fractional Savings Uncertainty (FSU) is a key consideration in gauging an NMEC portfolio. The California Public Utilities Commission's NMEC rulebook states that the FSU for a population-level NMEC portfolio should be no more than +/- 25% at the 90% confidence level.

Fractional savings uncertainty can be assessed at a meter or portfolio level.

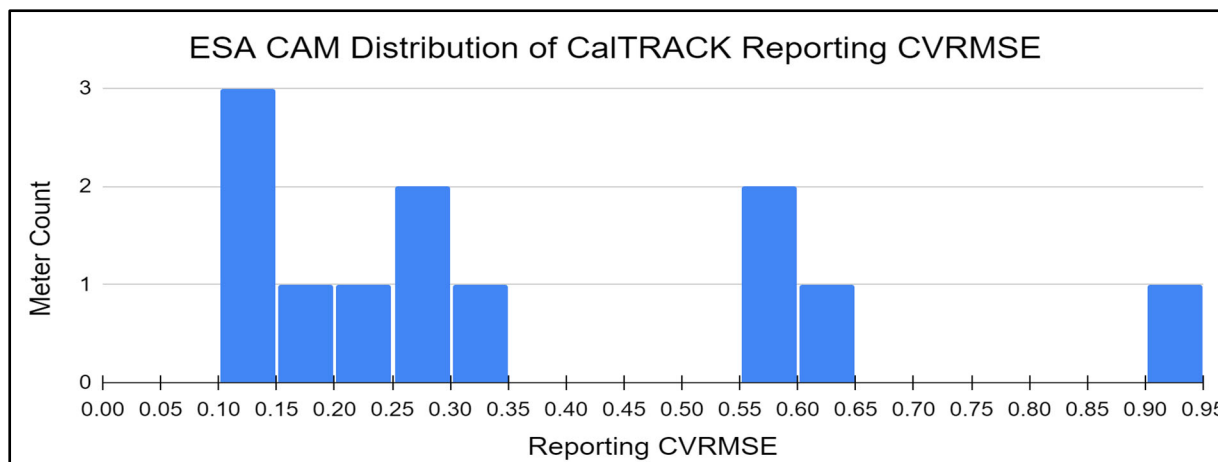
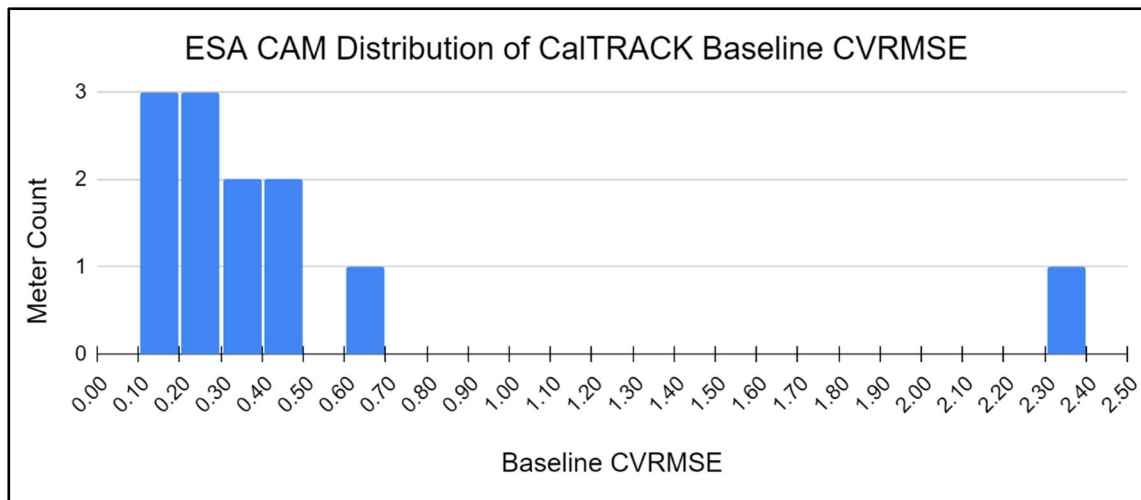
For example, Recurve computes the FSU for the meter in Figure 3 to be

+/- 19%. The FSU for the full ESA CAM portfolio, however, is +/- 252.6%. Fractional savings uncertainty lowers with increased meters and greater savings depth, characteristics not present in the ESA CAM portfolio (only 12 meters with -1.3% savings).

Another factor that impacts the FSU is the CalTRACK model fit. A common measure of model fit is the CVRMSE. CVRMSE values above 0.75 are considered poor while values between 0.25 and 0.5 are considered reasonable and values below 0.25 considered good or excellent. The CVRMSE is a reflection of the ability of a model to form an accurate prediction of energy consumption in the absence of a program. For example, Recurve computes the CVRMSE for the meter in Figure 3 to be 0.30. In the full ESA CAM portfolio, there is one meter from the Indio project with a baseline CVRMSE > 1, which triggers an exclusion under Recurve's general savings calculation methodology.

Figure 5 shows a distribution of the CVRMSE values for all meters in the SoCalGas ESA CAM portfolio.

Figure 5: Distribution of meter-level baseline (top) and reporting (bottom) CalTRACK Daily CVRMSE values for the ESA CAM portfolio



One can see that the vast majority of meters in both the baseline and reporting periods were modeled very well by CalTRACK.

Applying Recurve's exclusion criteria and removing both the Mission Village (savings <-50%) and Las Palmas (CVRMSE>1) meters from the portfolio, the FSU is +/- 8.8%. This figure gives a more accurate representation of program performance with a much higher degree of certainty. With the two projects excluded, the ESA CAM program saved 2,313 Therms, or 13.5%

CALIFORNIA ALTERNATIVE RATES FOR ENERGY (CARE) PROGRAM ANNUAL REPORT

2. CARE EXECUTIVE SUMMARY

The SoCalGas CARE Program, formerly known as the Low Income Ratepayer Assistance Program (LIRA) was established through a legislative mandate and was implemented by the Commission in D.89-07-062 and D.89-09-044.⁵² The Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in 1992.⁵³ The program was further expanded to qualified agricultural employee housing facilities in D.95.10-047.⁵⁴ In PY2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.⁵⁵

Since PY2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines (FPG).⁵⁶ In PY2010, the legislature enacted Senate Bill (SB) 695 which changed PUC section 731.9 to state that eligibility for the CARE Program should be no greater than 200% of the FPG. In PY2006, the Commission authorized the utilities to implement: 1) Categorical Eligibility (CE) which allowed customers to qualify for CARE based on their participation in certain state or federal public assistance programs; 2) four-year recertification for low-income customers with a fixed income; 3) a

⁵² D.89-07-062, OP 1; D.89-09-044, OP 1

⁵³ D.92-04-024, OP 1.

⁵⁴ D.95.10-047, Findings of Fact (FOF) 2 and OP 2.

⁵⁵ D.05-04-052, p. 99, OP 1.

⁵⁶ See D.05-10-044, p. 35, OP 1.

process to enroll certain prospective CARE qualified households by telephone; 4) a process to allow all customers to recertify their CARE eligibility through the IVR system; and 5) internet-based CARE enrollment and recertification.

In D.08-11-031, the Commission expanded the list of CE programs to further align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population.⁵⁷ Annual funding and participation targets for 2021-2026 was authorized in D.21-06-015.⁵⁸

On March 4, 2020, Governor Gavin Newsom issued a State of Emergency that identified the COVID-19 pandemic as a disaster emergency affecting the State of California.⁵⁹ On March 16, 2020, Governor Newsom issued Executive Order N-28-20, requesting that the Commission monitor the measures by public and private utility providers to implement customer protections in response to COVID-19.⁶⁰ On March 17, 2020, Commission Executive Director Alice Stebbins directed utilities to submit advice letters implementing the applicable customer protections set forth in D.19- 07-015 and to apply such

⁵⁷ D.08-11-031, pp. 6-7, 202-203.

⁵⁸ D.21-06-015, OP 2 and Attachment 1.

⁵⁹ State of California Executive Department, *Proclamation of State of Emergency* (March 5, 2020) available at: <https://www.gov.ca.gov/wp-content/uploads/2020/03/3.4.20-Coronavirus-SOE-Proclamation.pdf>.

⁶⁰ State of California Executive Department, State of California, *Executive Order N-28-20* (March 16, 2020), available at: <https://www.gov.ca.gov/wp-content/uploads/2020/03/3.16.20-Executive-Order.pdf>.

protections retroactively to March 4, 2020, when the State of Emergency was declared.⁶¹

On April 16, 2020, the Commission adopted Resolution M-4842, Emergency Authorization and Order Directing Utilities to Implement Emergency Customer Protections to Support California Customers During the COVID-19 Pandemic, directing utilities to offer the protections adopted in D.19-07-015 to all residential and small business customers through April 16, 2021, with an option to extend that date.⁶²

When the pandemic began to adversely affect California, SoCalGas implemented several customer protections specific to the CARE Program. In response to the March 17, 2020, Letter from Executive Director Stebbins and Resolution M-4842, SoCalGas submitted AL 5604-B on May 22, 2020, affirming its compliance with specific emergency customer protections and outreach activities in light of the COVID-19 pandemic.⁶³ The AL provided a detailed response to address the emergency customer protections listed in Resolution M-4842, as well as SoCalGas' outreach regarding those protections. The emergency customer protections as it relates to low-income customers included:

- Suspension of CARE Program removals to avoid unintentional loss of the discounted rate during the period for which the customer is protected under these customer protections; and
- The discontinuation of standard recertification and verification requests which require customers to provide their most recent income information.

⁶¹ State of California Public Utilities Commission, *E-Mail regarding Emergency Customer Protections to Support Customers Affected by the COVID-19 State of Emergency* (March 17, 2020), available at: https://www.cpuc.ca.gov/-/media/cpuc-website/files/uploadedfiles/cpucwebsite/content/news_room/newsupdates/2020/exec-director-letter-to-energy-companies-re-covid19-march-17-2020.pdf.

⁶² Res. M-4842, available at: <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M333/K482/333482381.PDF>

⁶³ SoCalGas Advice Letter 5604-B - Supplement - Implementation of Emergency Customer Protections to Support California Customers During the COVID-19 Pandemic Pursuant to Resolution M-4842, available at: <https://tariff.socalgas.com/regulatory/tariffs/tm2/pdf/5604-B.pdf>.

Once the COVID-19 customer protections were lifted on July 1, 2021, SoCalGas continued its pre-COVID recertification and verification processes. During the time of customer protections, SoCalGas only sent marketing communications to new customers and existing customers not enrolled in CARE. SoCalGas resumed its pre-COVID marketing practice of targeting customers needing to re-apply to the program in Fall 2021. The three customer groups are targeted based on internal analytics. ZIP codes and penetration rates were used to identify enrollment gaps and specifically target potential new customers, those who needed to recertify and those who needed to re-enroll. SoCalGas's customers were able to apply for CARE and recertify their CARE eligibility online in the top five languages (English, Spanish, Chinese, Korean, Vietnamese), and were able to apply for the program via downloadable PDF application by mail or fax in 13 different languages (English, Spanish, Arabic, Armenian, Chinese, Farsi, Hmong, Khmer, Korean, Russian, Tagalog, Thai, Vietnamese). All forms are accessible and responsive to mobile devices.

This report provides information on SoCalGas's CARE Program accomplishments and expenditures for PY2021. At year-end of PY2021, the CARE Program had enrolled over 270,515 new customers and ended PY2021 exceeding its 95% target with a penetration rate of 105.82%. Other notable achievements and key activities of the CARE Program in 2021 include:

- Continuation of real-time enrollment through CSRs during turn-on and payment extension calls resulting in 102,604 new enrollments, the largest source of new enrollments for 2021;

- Continuation of CARE enrollment, recertification and PEV – except as precluded by the COVID-19 customer protections - via SoCalGas website and My Account allowing customers real-time enrollment and access to their current CARE status, resulting in 13,220 approved applications;
- Continuation of the Mobile Home Park Utility Upgrade Program and seamless transfer of CARE and MBL benefits to the customers' new gas accounts;
- Continued best practices in CARE scanning operations for efficiency and accuracy of application processing;
- Completed final bi-annual data transfers of CARE customer information to CPUC Lifeline administrator per D.16-11-022 on January 15 and July 15, 2021.
- Completed quarterly data exchanges with participating water utilities in SoCalGas's service territory in compliance with D.11-05-020 in March, June, September and December 2021, per the CARE All-Party Meeting Ruling.⁶⁴
- Per joint stipulation with the IOUs and California Emerging Technology Fund (CETF), promoted education and outreach to assist SoCalGas customers in accessing affordable broadband offers through CETF.
- Developed memos of understandings with 35 community- and faith-based organizations and participated in almost 2,000 events promoting SoCalGas's Customer Assistance Programs.

⁶⁴ Assigned Commissioner's Ruling in Response to May 22, 2020, All-Party Meeting on California Alternate Rates for Energy Outreach in Light of COVID, June 15, 2020.

2.1 Participant Information

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

CARE Residential Program		
Gas Customers by Month		
Month/Year	Customers	% Change
January 2021	1,777,521	0.58%
February 2021	1,787,290	0.55%
March 2021	1,796,671	0.52%
April 2021	1,808,053	0.63%
May 2021	1,824,721	0.92%
June 2021	1,829,212	0.25%
July 2021	1,839,181	0.54%
August 2021	1,847,416	0.45%
September 2021	1,856,516	0.49%
October 2021	1,845,546	-0.59%
November 2021	1,827,239	-0.99%
December 2021	1,815,711	-0.63%

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

SoCalGas used the joint utility methodology adopted in D.01-03-028 for developing monthly penetration estimates by energy source in 2021. This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the 2021 eligibility estimates included the January 2021 Health and Human Services (HHS) Poverty Guidelines (“bundling” one- and two-person households at the HHS-defined 200% FPG limit as required by Assembly Bill (AB) 327), current year small area vendor marginal distributions on household

characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2019 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration American Community Survey microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

The impact of labor force changes (unemployment and other forms of job separation, as well as positive changes) is also incorporated in the methodology. Method adjustments include block group marginal distributions on household income based on sub-state modeling that incorporates the Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey data, and the California EDD county and metropolitan statistical area level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

The approach to labor market adjustment was modified in 2021, making less use of State EDD data and more use of monthly CPS data, to be more sensitive to the

ups and downs of the labor market throughout the year. Additionally, the 2015-2019 ACS PUMS data was used to estimate via simulation the effects (specific to 2020) of Federal stimulus payments to households and Federal unemployment insurance supplementary payments.

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

SoCalGas counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

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

The joint utility methodology, as described above, was used throughout PY2021.

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

CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered

dwelling units only. Non sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

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

See response above to Section 2.1.2. Each quarter (January, April, July and October), SoCalGas applies the county and utility eligibility rates to its current set of CARE-eligible meters that includes both individually and sub-metered housing units. Once the factors are applied, estimates for CARE-eligible households by county were developed. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area such as ZIP+2, ZIP, tract, county, and territory.

2.1.2.4 Describe how current CARE customers were counted.

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

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

The formula for calculating CARE-participation is:

Number of CARE Customers

Number of Estimated CARE-Eligible Households

The participation rate is the total number of participating CARE customers divided by the estimated eligible CARE population.

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

SoCalGas is a single energy source utility for natural gas. At year-end 2021, based on the available eligibility data, of SoCalGas's 5,689,568 residential CARE-eligible meters, 31.91% or 1,715,832 households were estimated to be eligible for the CARE discount.

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

In December 2021, SoCalGas had 124,404 sub-metered tenants in 1,504 master-meter facilities. Assuming, by the methodology described above, 46.5% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 57,826 of its sub-metered tenants are CARE-eligible.

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

In December 2021, SoCalGas had 30,644 sub-metered tenants participating in the CARE Program.

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

SoCalGas estimates 53% of its CARE-eligible sub-metered tenants were enrolled in the CARE Program as of the end of PY2021, maintaining the submetered CARE penetration from 2020.

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

In PY2021, SoCalGas did not encounter any major problems in administering the CARE Program for sub-metered and/or master-metered customers.

2.1.8 Discuss the steps taken towards marketing CARE to Mobile Home customers and converting Mobile Home sub-metering to direct utility served customers.

During Mobile Home Park Resident Forums, SoCalGas Account Executives (AEs) are able to discuss the full details of their park's participation in the Mobile Home Park Utility Upgrade Program (MHP UUP). Throughout the account sign-up stage and following project completion, AEs dedicate time to help residents sign up for CARE and MBL, working with a CARE representative to ensure that both the CARE and MBL discounts are transferred to the tenant's newly established accounts prior to them receiving their first bill and before the Project Reconciliation stage.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs

CARE Budget Categories	Authorized Budget¹	Actual Expenses	% of Budget Spent
Outreach	\$4,197,109	\$4,187,822	100%
Proc., Certification and Verification	\$2,111,761	\$1,307,691	62%
Post Enrollment Verification	\$231,637	\$119,361	52%
Information Tech./Programming	\$1,030,505	\$646,079	63%
CHANGES	\$437,502	\$322,869	74%
Measurement and Evaluation	\$18,750	\$0	0%
Regulatory Compliance	\$685,432	\$347,264	51%
General Administration	\$1,071,966	\$795,014	74%
CPUC ED Staff	\$75,000	\$74,026	99%
Total Expenses	\$9,859,663	\$7,800,126	79%
Subsidies and Benefits	\$138,389,984	\$181,029,632	131%
Total Program Costs and Discounts	\$148,249,647	\$188,829,758	127%
¹ Reflects the authorized funding per D.21-06-015 dated June 3, 2021.			

2.2.2 Please provide the CARE Program enrollment rate to date.

CARE Enrollment Year-end 2021			
Participants Enrolled	Eligible Participants	Enrollment rate	Target Met?
1,815,711	1,715,832	105.82%	Yes

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

There were no recertification complaints in 2021.

2.3 CARE Program Costs

2.3.1 Discount Cost

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

The average monthly discount received per SoCalGas's CARE customer in PY2021 was \$8.08⁶⁵ per month.⁶⁶

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

SoCalGas's CARE customers and CARE Expansion customers (i.e., farm and migrant workers and those living in non-profit group living facilities or agricultural housing) received \$175,813,336 in natural gas rate discounts and \$2,602,800 in Service Establishment Charge (SEC) discounts in PY2021. The PY2021 annual subsidy for all SoCalGas CARE customers was \$178,416,136.

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

This section is not applicable to SoCalGas.

⁶⁵ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2020 by the monthly residential CARE customers: the total of the 12 months was then divided by 12 for the average monthly CARE discount per customer.

⁶⁶ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

2.3.2 Administrative Cost

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

See section 2.2 or CARE Table 1 in the attachments.

2.3.2.2 Explain what is included in each administrative cost category

Marketing & Outreach M&O: This category includes costs for the printing and mailing of CARE applications recertification requests, PEV requests, monthly sub-metered unit lists, and correspondence, the printing and mailing of SB 920 annual notification,⁶⁷ postage, bill inserts, brochures, flyers, advertising, text messaging, direct mailing campaigns, web campaigns, social media, third party outreach, door-to-door canvassing, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Compensation for CBOs who are paid monthly stipend based on agreed amount in Memos of Understandings are also included in this category. Thirty-five (35) Community Based organizations were brought on board in 2021 to build awareness on Customer Assistance Programs. Capitation payments and any agency-related outreach support efforts are included in this category as well. Capitation payments are compensation fees paid to CBOs that

⁶⁷ SB 920 requires that homeowners and residents of a master-metered park receive notification in their utility billing statement of the assistance available to them under the CARE Program. This notification must be received on or before February 1 of each year.

assist SoCalGas in enrolling hard-to-reach CARE-eligible customers in the program.

Processing, Certification and Recertification: This category includes costs for CSR CARE enrollment, the CARE Processing Group labor, and document scanning costs. The function of the CARE Processing Group includes: 1) processing CARE applications; 2) initiating and responding to customers' inquiries regarding CARE applications and/or the program; 3) enrolling customers over the phone; and 4) determining CARE eligibility based on income or assistance programs documentation received.

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

Information Technology (IT) Programming: This category includes IT labor and contractor costs to maintain the SoCalGas CARE application billing system, CARE IVR applications, CARE online applications, CARE functions in CSR enrollment, My Account, CARE documents, CARE database, system reports, data

exchanges with other utilities, charges to conduct system enhancements to comply with Commission mandates, and improvements in operational efficiency.

CHANGES: This category includes costs related to the Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) program billed by the CPUC.

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates.

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

General Administration: This category includes costs for program management labor, tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting; office supplies, market research, and general business expenses.

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

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

At year end 2021, the CARE balancing account was under-collected by \$36,684,755.

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

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

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

See CARE Table 10 in the attachments.

2.4 Outreach

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

In PY2021, SoCalGas continued to use both targeted and grassroots marketing and outreach tactics to extend awareness and participation in the CARE Program. Targeted tactics include a multi-media advertising campaign, direct mail, email, text messages, bill inserts, door-to-door canvassing, and participation in community outreach events. In addition to these targeted tactics, in PY2021, SoCalGas worked with CBOs to help

with outreach of the CARE Program and promote awareness in order to increase enrollment with customers while continuing to expand awareness to hard-to-reach customers. These CBOs serve specialized markets and help SoCalGas enhance awareness of the CARE discount to communities. As an example, in PY2021, SoCalGas partnered with Goodwill of Orange County. Since 1924, Goodwill of Orange County has provided thousands of people with disabilities and other barriers the opportunity to achieve their highest levels of personal and economic independence through competitive employment. The Orange County operation began as a storefront on Fourth Street in Santa Ana and has since become a well-recognized community service provider and leading employer with more than 900 employees and an annual budget of more than \$78 million. Thousands of children and adults with disabilities or other barriers are served every year. Goodwill Orange County has assisted SoCalGas's Customer Assistance Programs by displaying CAP information in their stores and resource centers as well as educating their employees on the programs.

In addition, SoCalGas also partnered with Food Share of Ventura County. 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. Every month, Food Share of Ventura County also distributes "Senior Kits" with SoCalGas's CAP materials at various locations

throughout Ventura County. Food Share of Ventura County distributed over 66,000 Customer Assistance Program applications/collateral at over 534 events in 2021. As Ventura County's regional food bank, Food Share provides food for 140,000 hungry friends and neighbors monthly.

In the 2021-2026 Low Income Application proceeding, CETF recommended that CARE and ESA Program customers be informed of reduced-cost affordable broadband offers through marketing. CETF's proposal sought outreach in the IOUs' ME&O efforts, customer referral to CETF-designated CBOs, and addition of a website link onto utility websites. CETF, SoCalGas, PG&E, SDG&E, and SCE have agreed to a Joint Stipulation to accomplish affordable broadband offer marketing. The Joint Stipulation was approved by the Commission and includes authority to use authorized CARE/ESA dollars to market affordable broadband for 2021 through 2026.⁶⁸ Among the agreements in the Joint Stipulation, SoCalGas agreed to add a weblink to its website, providing a contact to obtain further information.⁶⁹ It will also integrate an affordable broadband offer into select customer assistance program direct marketing materials biannually as determined in the sole discretion of each IOU.⁷⁰ CETF will also have an opportunity to include affordable

⁶⁸ D.21-06-015, p. 66.

⁶⁹ *Id.*, pp. 66-67.

⁷⁰ *Id.*, p. 67.

broadband offer materials into ESA Program education kits.⁷¹ Finally, CETF will have the opportunity to present affordable broadband opportunities to CBOs and ESA Program contractors during IOUs respective relevant meetings.⁷² In PY2021, CETF was promoted on SoCalGas's website (socalgas.com/Assistance and socalgas.com/Asistencia) and via monthly CARE emails to residential customers. In addition to promoting CETF via marketing channels, SoCalGas includes CETF information in ongoing CBO training presentations. SoCalGas will continue to cross-promote affordable broadband messaging when relevant and appropriate.

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

⁷¹ *Id.*, p. 66.

⁷² *Id.*

consists of short, 30-second Spanish language ads that run several times a day.

In 2021, SoCalGas's three CARE campaigns (further discussed in the below Multi-Media section) generated approximately 60,475,126 total ethnic media impressions for Hispanic, Chinese, Vietnamese, and Korean markets across a channel mix including radio, digital, television, and social media. Specifically,

CARE Q12021 Campaign – Hispanic Market (February – March 2021)

- Display Banners: 8,613,613 impressions
- In-Feed Video: 3,285,395 impressions
- Telemundo Integrated Segment: 900,706 impressions
- Streaming/Video-on-Demand: 676,081 impressions

CARE 2021 Chinese, Korean, and Vietnamese In-Language Campaign:
(June – August 2021)

- Display Banners: 2,273,022 impressions
- Mobile Ads: 2,175,487 impressions
- In-Feed Banners: 4,730,667 impressions
- Online Addressable Banners Spectrum: 456,605 impressions
- Search Ads: 805 impressions
- Social Display Ads (Facebook): 6,287,233 impressions
- Out-of-Home (OOH) Transit Shelters: 3,103,448 impressions
- Print & TV Ad Insertions: 1,379,310 impressions

CARE Fall 2021 Campaign – Hispanic, Chinese, Korean, and Vietnamese
Markets (October – December 2021)

- KJLH Radio: 280,899 impressions
- Streaming/Video-on-Demand: 1,353,289 impressions
- Display Banners: 19,428,855 impressions
- Social Display Ads (Facebook): 2,096,205 impressions
- Out-of-Home (OOH) Transit Shelters: 2,730,276 impressions
- Print & TV Ad Insertions: 1,379,310 impressions

In addition to the radio spots, SoCalGas's relationship with Radio Campesina continued in 2021. Radio Campesina provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Food, musical entertainment, and information from SoCalGas regarding the CARE Program are part of these lunch break sessions. Due to continued COVID-19 restrictions, SoCalGas was unable to participate in some community events and local school events. In lieu of some of these events, Radio Campesina increased the SoCalGas social media presence. Instead of the in person activities, Radio Campesina increased the presence of SoCalGas via social media posts and other media opportunities. SoCalGas also continued its relationship with MICOP Radio Indigena 94.1 where local SoCalGas staff provides information on Customer Assistance Programs, how to obtain applications, and where to receive information on assistance with completion of applications.

Multi-Media: SoCalGas coordinated three CARE paid media campaigns for PY2021. The first campaign was launched in February and ended in March. The effects of the pandemic still lingered in early 2021, and this campaign intended to continue efforts of 2020 CARE campaigns to reach newly eligible customers impacted by the COVID-19 pandemic and previously eligible customers in the low-income segment seeking financial relief throughout the SoCalGas territory. The campaign messaging focused on SoCalGas being available to help alleviate financial burdens through the CARE Program, allowing customers to focus on the important things by explaining the simplicity of the online application and enrollment process. This campaign reached customers in the General and Hispanic markets across channels including digital, radio, out-of-home (OOH) media (billboards and a bus wrap throughout targeted routes in high priority zip codes), and television (integrated local segments on NBC and Telemundo). Overall, the campaign resulted in:

- 19,420,602 total impressions across the General and Hispanic markets
- 92,915 CARE webpage visits, with an 3:04 average time spent on the page, indicating strong interest in the program
- 2,617 program applications
- 599,504 social media impressions, with 5,603 engagements
- A 97% completion rate from streaming video, showing that the message and creative resonated with viewers.

SoCalGas launched a second campaign in June that ended in August. This campaign targeted Chinese, Vietnamese, and Korean communities within

the top zip codes identified as having the lowest CARE Program penetration rates. This in-language campaign provided program information across multiple channels, including out-of-home (OOH) advertising, print, digital, and social media, to customers who may not be familiar with the CARE program due to potential language barriers. The campaign's messaging focused on how CARE could provide qualifying customers with a 20% discount to help them save more and worry less about their monthly natural gas bill and focus on what matters most to them. Overall, the campaign resulted in:

- 20,406,578 total impressions
 - 8,007,143 impressions across Korean in-language efforts or 39% of total impressions
 - 7,064,573 impressions across Chinese in-language efforts or 35% of total impressions
 - 5,334,862 impressions across Vietnamese in-language efforts or 26% of total impressions
- 53,139 CARE webpage visits during the weeks of the campaign, with 41,514 of those visits being from users identified as being new to the webpage
 - 18,860 sessions on the English CARE webpage
 - 11,070 sessions on the Korean CARE webpage
 - 10,473 sessions on the Vietnamese CARE webpage
 - 10,444 sessions on the Chinese CARE webpage
 - 2,292 sessions on the Spanish CARE webpage
- 6,927 program enrollments from 6/7/21-8/1/21 vs. 3,683 program enrollments from 6/7/20-7/31/20

- 6,287,233 social media impressions with 28,892 engagements, with social media delivering the highest amount of traffic to the Korean, Chinese, and Vietnamese CARE landing pages

While the campaign results show strong interest in the program from these targeted customers, a continued educational outreach and promotion of CARE within these communities would be beneficial, as determined by a low average webpage session at 00:48 and a high bounce rate despite high traffic numbers. To build off this effort and continue reaching these communities, SoCalGas again targeted Chinese, Korean, and Vietnamese customers in its final CARE 2021 campaign.

Lastly, SoCalGas launched a fall 2021 CARE multi-channel mass media campaign in late October that ended in late December. With the temporary suspension of the recertification and PEV processes ending in July 2021, SoCalGas's priority is to help customers remain on the CARE Program. With this in mind, a goal of this mass media effort was to increase customer awareness around the need to take steps to retain their monthly 20% discount. The fall 2021 CARE mass media campaign not only encouraged customers to apply for the program but mentioned that customers may re-apply as well. The "re-apply" message encouraged customers to either re-apply to continue their monthly 20% bill discount or re-enroll in the program if they are still eligible. The overall message was how "easy" it is to apply and re-apply to the CARE Program within minutes. This mass media campaign reached customers in the SoCalGas territory with messages available in English, Spanish, Chinese, Korean, and Vietnamese across channels including digital, radio, OOH media (outdoor transit shelters

throughout targeted Korean, Chinese, and Vietnamese communities), television (integrated segments and live mentions), and more. As for the PY2021 ESA Program campaign, this CARE campaign also targeted unemployment and social services offices within the SoCalGas service territory to provide viewers at those locations with CARE mobile ads, contributing to 7,428 program webpage visits and an extremely high click-through rate of 4.19%. In addition to radio commercials to reach customers who may not have internet or smartphone access, SoCalGas organized radio spots and DJ endorsements of the CARE Program across KISS, KLJH, and KRRL, resulting in 105 radio spots (60 DJ endorsements and 45 30 second radio spots). When listeners hear a representative of their radio station of choice directly promote the CARE Program and its benefits, it lends legitimacy, and these radio efforts delivered 1,681,452 impressions. Overall, the campaign resulted in:

- 41,805,681 total impressions across channels
 - 16,171,034 impressions across General and Hispanic markets
 - 25,634,646 impressions across the Chinese, Vietnamese, and Korean markets
- 55,894 CARE webpage visits with a strong session duration of 70 seconds, demonstrating the campaign is reaching the right customers and the overall message resonated
- 9,936 CARE Program enrollments from 10/25/21-12/13/21
 - 7,213 new program enrollments
 - 2,723 re-enrollments
- 5,808,646 social media impressions and 39,751 post engagements
 - 1,859,575 Spanish ad impressions

- 1,852,866 English ad impressions
- 2,096,205 Chinese, Korean, and Vietnamese ad impressions
- A high average 95% streaming video confirmed rate confirming the audience resonated with the messaging throughout the entire campaign timeframe

The General Market slightly outperformed the Hispanic Market at 98% versus 97.93%.

Social Media: Social media was a channel used for every SoCalGas paid media campaign, and SoCalGas also posted monthly social media posts promoting the CARE Program. These social posts were promoted to the entire SoCalGas service territory to help build awareness of the program and drive viewers to the CARE webpage to apply. On average, these posts reached approximately 4,449 customers on Facebook and 3,096 customers on Twitter, with Twitter delivering the most engagements. The average Facebook cost-per-link-click was \$1.09. During months where a program has an ongoing paid media campaign, SoCalGas paused internally created program-specific posts to avoid conflicting efforts and instead shared a message generally promoting all SoCalGas customer assistance programs. This ensured interested viewers are still able to learn more about the CARE Program if they visit the main customer assistance programs webpage.

Text Messages: Text messaging is a low-cost channel, and SoCalGas wants to continue utilizing this communication channel in strategic and effective ways, with the goal being to provide convenient, direct, and clear messaging to customers. In PY2021, CARE text messages provided eligible customers a link to the online CARE application and encouraged them to apply. As in PY2020, all recertification messaging was paused until November 2021. SoCalGas resumed pre-pandemic CARE program processes as pandemic-related protections ended July 2021. Until November, text messages were sent to new customers and existing customers not on CARE. Beginning in July 2021, SoCalGas resumed sending text messages to customers that were asked to recertify their eligibility to remain enrolled in the program. A total of approximately 226,186 texts were sent across targeted customers in 2021. These three groups of customers also received email and direct mailers with CARE Program information. A total of 12,532 CARE enrollments were tied to these text efforts.

Direct Mail: Direct mail continues to be a versatile and effective method for enrolling CARE customers. Generally, direct mail campaigns target customers with a probability of being eligible for low-income programs who meet the following criteria: CARE customers who have fallen off of the program and need to re-enroll, CARE customers who are nearing the end of the program term and need to recertify, new customers eligible for

CARE, existing SoCalGas customers who are not on CARE and CARE customers who have recently changed residence. Tools such as PRIZM codes are utilized to help identify these customers. However, as previously mentioned, due to the COVID-19 pandemic and enactment of customer protections, all re-enroll messaging remained paused until November 2021 as no customers were removed from the program. SoCalGas continued to only contact new and current customers not on CARE through direct mail until that time. SoCalGas resumed sending direct mail letters designed to reach customers who were previously participating in the CARE program but failed to recertify, encouraging them to reapply online and reestablish their monthly discount. With the CARE recertification process resuming as of July 1, 2021, the earliest that CARE customers may have been removed from the program (due to nonresponse) was October 2021.

During PY2021, direct mail messaging continued to provide savings information to customers with instructions on how to apply for the program online. Depending on the audience, the savings amount included in the message was unique to a specific customer by using personalized savings data based on past bills (current customers not on CARE and customers who must re-enroll) or reflected the average annual savings of a CARE customer (new customers).

In PY2021, SoCalGas continued to conduct annual Senate Bill 920 targeted mailing to master-metered facilities with sub-metered tenants to remind them of their responsibility to notify their tenants about the CARE Program discount available to them. SoCalGas also continues to maintain compliance with Assembly Bill (AB) 2104 by mailing out the monthly *Add & Delete Report* to notify owners/managers of sub-metered facilities of any tenants who have been added to CARE or removed from the program. Lastly, SoCalGas maintains compliance with AB 2857 by approving eligible sub-metered tenants who live in facilities that are not 100% sub-metered.

Bill Message: During PY2021, CARE bill messages were printed in both English and Spanish on non-participating customers' bills and were sent out in March, June, September and December. Generally, when applicable, CARE bill messages are sent out 90 and 45 days after the PEV letters are mailed to remind customers that SoCalGas has not received their verification application and proof of income. Further, if there is no response from the customer after 100 days, SoCalGas sends those customers a bill message informing them that they have been removed from the program. However, due to the COVID-19 pandemic and customer protections, no bill messages were sent requesting PEV until July 1, 2021, as PEV was not required while customer protections were in

effect. No CARE customers were removed from the program due to these protections, regardless of PEV status.

CARE messages were also added to the outgoing envelopes used to mail customers' natural gas bill in January, February, September, October, November, and December.

Bill Inserts: Bill inserts continue to be a low-cost method to create program awareness and encourage enrollment. The inserts/applications are bilingual in English and Spanish and contain basic program information. In November 2021, SoCalGas sent out a bill insert to approximately 1.5 million residential customers. The bill insert included the annual eligibility guidelines. To fulfill the AB3 mandate, SoCalGas also sent approximately 35,997 bill inserts to non-residential customers at risk of having their service shut off. These bill inserts were only mailed to non-residential customers in PY2021 due to the COVID-19 customer protections, which included a moratorium on disconnections. The bill insert highlighted the Customer Assistance Programs available to help manage their bill. The AB 3 bill insert will again be sent with residential notices once pre-pandemic process resumes sometime in PY2022. In October 2021, SoCalGas also sent out a bill insert to approximately 6,169 commercial customers. This bill insert described the CARE rate for

commercial facilities such as non-profit group living and migrant farmworker housing.

Cross Program Promotion: Communication and outreach opportunities were sought out to cross-promote the CARE Program with other CAPs and EE programs to maximize customer value and reduce costs. The ability to apply for CARE through SoCalGas's ESA Program applications made it easier for customers to obtain services and other SoCalGas assistance program information simultaneously. SoCalGas also promoted external programs, including California Lifeline for discounted phone service, California Emerging Technology Fund (CETF) for low-cost internet service, and the federal Emergency Rental Assistance Program (ERAP) and rent and utility relief across its outreach efforts. Customer information obtained from SoCalGas's ESA Program and Gas Assistance Fund (GAF), along with Low Income Home Energy Assistance Program (LIHEAP), is used for CARE enrollment, recertification, and verification purposes. Certain collateral materials used by SoCalGas's Outreach department and Field Operations personnel have been specifically designed to provide customers with information on all available low-income and special needs customer programs and services. Field Operations is instructed to leave CAP information material in English and Spanish every time a customer's home is entered for services.

SoCalGas.com Website: Throughout the COVID-19 pandemic in 2020 and 2021, the SoCalGas website (www.socalgas.com) remained a 24/7 communication and enrollment channel for the CARE Program. A new landing page for customers (www.socalgas.com/coronavirus) was created in March 2020, demonstrating how SoCalGas worked to quickly assist customers through this extremely difficult time. Information (for residential and small business customers) detailing customer protections, how to take advantage of the CARE 20% discount, and more was added. Information continued to be updated and added throughout 2021 as new assistance became available, and CARE continued to be specifically promoted.

The CARE webpage was promoted via monthly email blasts directing the customer to socalgas.com to apply. Mailed paper applications also provided the option to apply online, allowing customers to enroll in CARE in real-time. In addition, customers who were already on CARE and received a reminder via email or a letter to recertify their eligibility were directed to the website where they were able to recertify online. However, due to established customer protections in 2020 in response to the COVID-19 pandemic, no recertifications were necessary for customers to remain on the CARE Program until the resumption of the recertification process in July 2021.

SoCalGas offers real-time online applications in the following five languages: English, Spanish, Chinese, Korean, and Vietnamese.

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

Customer Contact Center (CCC): While customers are on hold to speak to a CSR, the IVR system informs them about CARE and other assistance programs. As of February 2018, CSRs began offering immediate CARE enrollment to customers who call to start new gas service or make payment arrangements. In 2021, CSRs completed the CARE enrollment of 102,604 customers. For customers who prefer to receive an application in the mail, CSRs initiate the mailing.

In its pursuit for continued improvement in customer service, SoCalGas is exploring ways to expand the category of customers who are enrolled by a CSR, and not limit it to turn-ons and payment arrangements. This would include offering CARE enrollment to customers who call regarding the Arrearage Management Payment Plan (AMP), or any billing related calls.

CSRs also provide information regarding all other Customer Assistance Programs to facilitate enrollment of eligible customers.

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

Branch Payment Offices (BPO): Typically, English and Spanish CARE applications and program information brochures are available in all BPOs, and the CARE Program is promoted during every transaction. Furthermore, English and Spanish CARE posters that are complete with program guidelines and helpful information are on display in each BPO as well. These applications, brochures, and posters are revised and distributed as program information and income guidelines change. However, in mid-March 2020, all BPOs were closed to the public until July 2021. Once reopened in July 2021, all locations provided the most up-to-date CARE collateral to customers visiting in person.

Community Events: During PY2021, SoCalGas personnel along with its community partners participated in almost 2,000 general and low-income specific community events. The goal of each event was to generate awareness of and increase participation in Customer Assistance Programs. SoCalGas has strived to use events and event sponsorships to extend messaging with its communities and as opportunities to work with other organizations so that residents and customers get maximum value from attending. Although COVID-19 restrictions continued, limited in-person events were held. Most large events such as county fairs were completely cancelled. Because of the strong relationships developed with key community partners, the awareness of programs continues via events held by the organizations. Examples of activities in PY 2021 where Customer Assistance Program information was distributed included Food Distributions, Senior Kit Distributions, emergency box distributions, and vaccine clinics to name a few.

Third-Party Outreach: In order to improve its efforts to communicate with hard-to-reach customers, SoCalGas has contracted with a third-party contractor to perform door-to-door outreach for new CARE enrollments. These outreach contractors produce high volume enrollments from a hands-on customer approach.

Community-Based Organizations (CBOs): In PY2021, SoCalGas continued its grassroots outreach efforts. The primary driver has been to establish relationships with Faith-Based Organizations (FBOs) and CBOs in order to enroll hard-to-reach customers. During PY2021, SoCalGas continued working with existing organizations, and also added several new key partners to expand awareness. Below are key partners from PY2021.⁷³

- **211 LA County:** Customer Assistance Programs and service information continue to be added to the growing California 211 information and referral network. 211 LA County provides social and support services to assist those in need which are mainly low-income residents. SoCalGas works very closely with 211 LA County so that the CARE and Medical Baseline Programs are key components of the operator's assessment of the caller's needs.
- **Families Forward:** Families Forward is an organization that has been helping families in need achieve and maintain self-sufficiency through housing, food, counseling, education, and other support services. Families Forward holds strong to its commitment to the values of dignity, empowerment, accountability, community spirit, and hope since 1984. A key factor for success is Families Forward's commitment to collaborate with many organizations to end family homelessness in Orange County, including Orange

⁷³ List of organizations in PY2021 include: 211 LA County, Blindness Support Services, Catholic Charities of Orange County, Center for Family Strengthening – Promotores Collaborative of San Luis Obispo, Disabilities Community Resource Center, El Nido Family Centers, El Concillo del Condado de Ventura, Families Forward, Fiesta Educativa, FIND Foodbank, FoodShare of Ventura County, Foodbank of Santa Barbara County, Frank D. Lanterman Regional Center, Goodwill of Orange County, Human Services Association, Inner City Law Center, LIFT LA, MEND, Mixteco Indigena Community Organizing Project (MICOP), OC Autism, ONEGeneration, Radio Campesina – Cesar Chavez Foundation, Second Harvest Food Bank, Southeast Community Development Corporation (SCDC), Southern California Indian Center, Southern California Resource Services for Independent Living (SCRS-IL), St. Barnabas Senior Services, The Link Family Resource Center Serving San Luis Obispo County, The Los Angeles County / University of Southern California Medical Center – Center Auxiliary for Recruitment, Education and Services (CAREs) The Vietnamese Community of Southern Californians (VietSoCal), Unity Shoppe, Veterans Legal Institute, Walking Shield, Via Care Community Health Center, and Worksite Wellness LA.

County United Way, the Commission to End Homelessness, First 5 Orange County and many other partner agencies and foundations.

- **LAC + USC Medical Center CARES:** This partnership was established in 2020 and remains an integral part of building awareness of programs in the general Los Angeles County area. The partnership with the Center Auxiliary for Recruitment, Education and Service which is the auxiliary for the Los Angeles County + USC Medical Center is also known as CARES. Los Angeles County + USC Medical Center is one of the largest public hospitals in the country ensuring that treatment is available to every member of the community. CARES is a California nonprofit corporation, providing financial support and volunteer services. Its primary mission is to benefit patients by adding comfort to their hospital stay and providing services which help the patients and their families access quality healthcare. Through this partnership, CARES provides SoCalGas CAP information in their senior food distributions, CARES Child and Family Program, Obstetrics department and information stands placed throughout the medical center. In addition, SoCalGas will be invited to speak to staff at the medical centers who provide information to patients about the program once COVID-19 restrictions for in-person activities are lifted.
- **CFS – Promotores Collaborative:** In San Luis Obispo County, a new partnership has been established with Center for Family Strengthening - Promotores Collaborative (CFS- Promotores Collaborative). This organization aims at developing a sustainable, diverse, and comprehensive culture that promotes equal access to community resources and services among all members of the Hispanic community in San Luis Obispo County. The Promotores are provided with the tools needed to work as advocates, change agents, and partners with local agencies for positive change. Through this partnership, 20 Promotores located in Paso Robles, San Miguel, Shandon, Atascadero, San Luis Obispo, Los Osos, Five Cities and Nipomo have been trained on the SoCalGas CARE Program. The Promotores are actively participating in food bank distributions and will use that platform to inform customers on SoCalGas Customer Assistance Programs. In addition, CARE information was disseminated in parenting classes and support programs as well as their social media outlets.
- **Fiesta Educativa:** Fiesta Educativa is an organization that provides information and training to Latino families on how to obtain services for all persons with disabilities. In addition, training is provided to professionals who work with these families. Fiesta Educativa's efforts include an annual statewide

conference providing more than 1,000 parents with information in English and Spanish on such topics as resources, patient and client rights, educational and vocational programs, and stress management for families, as well as the sponsorship of several regional conferences throughout the state. COVID-19 restrictions changed the way that organization did work in PY2020. Virtual meetings with parents were held as well as phone calls with families they work with. These efforts continued into PY2021 as COVID-19 restrictions remained. Other activities included distributing PPE to families. Pre-COVID-19, Fiesta Educativa services included a home-based parent education and training program, “Fiesta Familiar,” and an advocacy and outreach project assisting families and persons with disabilities to make the best use of the agencies and resources available to them in their communities.

- **FIND Food Bank:** SoCalGas began working with FIND Food Bank in late 2018. FIND is the only regional food bank serving eastern Riverside and southern San Bernardino Counties. They distribute over 12 million pounds of food assistance annually to an average 90,000 individuals each month across the two counties they serve. Food distributions are free and allow 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 which help end cycles of poverty and hunger. This is all done through 22 FIND Mobile Market Distributions and a network of over 66 community-based partners whose programs include mobile markets, food pantries, community feeding centers (soup kitchens), after-school and summer care programs for children, senior centers, faith-based organizations, and homeless shelters/missions, as well as CalFresh Outreach and Case Management Program that helps connect people and families who are food-insecure to additional resources for their household. CalFresh provides resources for people and families in need so they can shop for more healthy, nutritious food for themselves and their families.
- **Food Share Ventura County:** SoCalGas began working with Food Share Ventura County in July 2019. The organization 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. Through SoCalGas’s partnership, Food Share Ventura County distributes “Senior Kits” with SoCalGas CAP materials at various locations throughout Ventura County.

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

Capitation Contractors: In 2021, SoCalGas worked with three active capitation agencies, Los Angeles County Development Authority, Sigma Beta Xi and APAC Service Center & Insurance Services to enroll eligible non-participating customers in the CARE Program. These "CARE Capitation Contractors" are located throughout the SoCalGas service area and employ various types of outreach strategies, such as local community event participation, walk-in enrollment, and program material distribution to enroll customers. During 2021, to support CARE Capitation agencies, Capitation Program information and instructions were added to socialgas.com/care as well as the CARE brochure specifically designed for the agencies to download for their clients. SoCalGas also launched a web link for authorized Capitation agencies to assist customers with their CARE enrollment process online. The web link tracks their source code so they can receive credit for new CARE enrollments.

Lifeline: In January 2019, SoCalGas and the other IOUs began the biannual data sharing of CARE participant data to the ED originally ordered in D.17-12-009, and the details of the data sharing plan described in Midcycle AL 5325. In 2021, SoCalGas completed 2 exchanges with the CPUC's California Lifeline administrator on January 15 and July 15,

2021. On August 8, 2021, SoCalGas received written notification from the CPUC regarding termination of the Boost/CARE Pilot effective June 30, 2021, and the CARE participant data exchange was no longer required.

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

Although Home Energy Reports (HERs) continue to be generated for Energy Efficiency customers, the initiative to specifically target CARE customers concluded in 2020.

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

SoCalGas employed the following marketing and outreach tactics during PY2021: direct mail, bill inserts, email, text messaging, web-based messaging, multi-media campaign, CCC, third-party outreach, and customer outreach awareness efforts. Below is more detail on SoCalGas's largest sources of marketing and outreach-based CARE enrollments.

Direct Mail: In 2021, SoCalGas sent approximately 201,763 direct mailers to new customers and 300,000 direct mail letters to existing customers not on CARE. As previously mentioned, all recertification and re-apply messaging paused in PY2020 through July 2021 due to customer protections and no customers being removed from the program. With recertification processes resuming July 1, 2021, the earliest a customer may have been removed from the program (due to non-response) was October 2021. Beginning in November 2021, SoCalGas sent 36,281 direct mail letters in November and December to customers who fell off

the CARE Program encouraging them to reapply before the COVID-19 protections were implemented. SoCalGas online enrollments generated from direct mail cannot be tracked since they do not contain a source code.

SoCalGas's efforts to target and reach relatively large numbers of eligible customers not currently enrolled in the CARE Program are often accomplished through the direct mailing of CARE Program information which are all printed in English and Spanish and direct the customer to visit the website for immediate enrollment. These customers are selected based on an adjustable eligibility profile that shows them as living in high gap or high eligibility and low penetration areas.

Web Based Outreach: In PY2021, SoCalGas approved 5,163 online applications. All media and some direct mail communications directed customers to sign up for CARE through the website www.socalgas.com/care for English and www.socalgas.com/careparami for Spanish. Web-based marketing consisted of program promotion through SoCalGas web, email campaigns, social media, digital campaigns, and My Account.

Technology continues to play a large role in awareness and outreach. Social media sites such as Facebook and Twitter generate “click-throughs” and along with email-prompted web enrollment continue to be significant

contributors to participation. SoCalGas tested messaging through its social media channels and email subject lines to improve channel effectiveness and drive awareness of the program as well as online enrollments. SoCalGas acknowledged this trend and launched SoCalGas's My Account applications and online web applications in the last quarter of 2017. In PY2021, there were 8,598 My Account transactions which include self-certification, recertification, PEV and customer opt-out, resulting in 8,057 approved transactions.

Third Party Door-to-Door Outreach: During PY2021, 11,147 customers were enrolled by third party door-to-door outreach canvassers. Developed to perform outreach to SoCalGas's hardest-to-reach low-income customers, this proactive door-to-door enrollment tactic continues to be a key component of SoCalGas's marketing strategy. Although door-to-door activity was suspended at the beginning of the COVID-19 pandemic, activity was able to resume in June 2020. These outreach contractors produce high volume enrollments from a hands-on customer approach.

Bill Inserts: SoCalGas sent out over 1.5 million CARE bill inserts in November 2021, which resulted in approximately 905 customers newly enrolled onto the CARE Program.

As discussed in section 2.4.1, SoCalGas sent out one residential bill insert in November 2021 to all residential customers not enrolled in CARE. This communication aimed to help customers that were close to meeting the guidelines last year but fell slightly short of the eligibility requirements. In addition, the insert helped increase awareness of the CARE Program among new and existing customers. In October 2020, SoCalGas sent out a bill insert to 6,169 commercial customers. Going forward, residential bill inserts will only be mailed to residential customers not on CARE for optimal cost effectiveness.

Customer Awareness: Targeted multi-media campaigns and grassroots partnerships maintain and enhance the awareness of the CARE Program for SoCalGas. Many forms of outreach and advertising may go into the decision a customer makes when requesting a CARE application from SoCalGas, which reinforces SoCalGas's use of awareness channels, such as multi-media and outreach with CBOs. Even with direct mail, the reinforcement provided by other awareness channels plays an important role. Thus, SoCalGas tracks individual channels where possible, but also views various methods as inter-connected and mutually reinforcing. Below are examples of awareness channels that SoCalGas employed in PY2021.

- **Capitation Program:** In addition to capitation information in the latter part of Section 2.4.1, SoCalGas worked with different CBOs and outreach agencies to enroll eligible nonparticipating customers in the CARE Program during PY2021. CARE capitation

contractors are located throughout the SoCalGas service area and employ various types of outreach strategies to enroll customers, such as local community event participation, walk-in enrollment, and program material distribution.

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

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

The 2019 LINA study found that the most common barriers for CARE non-participants are lack of program awareness, a perceived inconvenience of applying for CARE, and a lack of understanding of how to apply or whether their household is eligible for CARE,⁷⁴ and these challenges were top of mind in 2021, especially as SoCalGas aimed to assist as many customers as possible throughout the pandemic. SoCalGas

⁷⁴ California Low-Income Needs Assessment (LINA) Final Report: Volume 1 of 3: Summary of Key Findings (2019), p. 5.

used this information, along with historical data about CARE-eligible households who did not respond to participation invitations to craft messaging and outreach materials. To continue addressing these barriers, SoCalGas's PY2021 multi-media campaigns aimed to build awareness for customers who had become unemployed and newly eligible for CARE due to the COVID-19 pandemic, along with previously eligible customers in the low-income segment who were seeking financial relief. The campaign messaging continued to focus on SoCalGas being available to help alleviate financial burdens through its programs, allowing customers to focus on the things that matter most to them, explaining the simplicity of the online application and enrollment process. SoCalGas also specifically targeted Chinese, Korean, and Vietnamese communities with this messaging and in-language promotions to help reach customers who may not be familiar with the program due to potential language barriers. As previously shared, the program being "easy" to apply or re-apply within minutes to was the main theme for the fall 2021 CARE campaign, and a high average 95% streaming video confirmed rate confirmed the audience resonated with this messaging. Due to customer protections, all CARE customers remained on the program without obligation to recertify from PY2020 until July 2021. In addition, the enrollment process did not require any verification to receive the 20% monthly discount until that time. The messaging of easy and quick enrollment is also featured on the CARE webpage and targeted direct marketing efforts, such as direct mail

and email, for an integrated and consistent program message. The visuals used for CARE campaigns is also included on the webpage and across marketing collateral for continued customer connection.

SoCalGas is working increasingly with its partners in the community to make computers accessible to the customers they serve. The computers are used as an opportunity to guide customers through SoCalGas's programs and online enrollment process as opposed to taking materials home – where can get lost due to hectic everyday life – pending the return by mail or other enrollment efforts. Online sign-ups played a key role in several outreach events and this approach is expected to continue and increase in the future. Partnerships with organizations like Southeast Development Corporation who have mobile computer labs, and Saint Barnabas Senior Services who have a Senior Tech Lab help by having this onsite enrollment for the customers they serve. In 2020, SoCalGas began looking into partnering with organizations that work in different segments that continue to be hard to reach such as foodbanks, community colleges, clinics, community centers, and/or consulates where customers are already there to seek information and can have access to learn about and enroll in SoCalGas's Customer Assistance Programs. Due to COVID-19, most community colleges went to virtual learning, and other organizations were overwhelmed with the increasing need for social services due to the

impacts of the pandemic. SoCalGas was able to bring on organizations in areas of increasing need.

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

Data Sharing: In 2021, SoCalGas continued the practice of data sharing CARE enrollments with other IOUs within its shared service territory. CARE eligible customer data continued to be exchanged with SCE, SDG&E, and PG&E to ensure that each IOU has the benefit of enrolling non-CARE customers into CARE. SoCalGas's customers enrolled through data-sharing are mailed a letter notifying them of their enrollment and are provided the opportunity to opt-out of SoCalGas's program, if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in PY2001. In PY2021, SoCalGas enrolled 42,726 SCE CARE customers into SoCalGas's CARE Program and recertified eligibility for 185,236 CARE customers to retain them for another two years.

During PY2021, SoCalGas conducted a monthly data exchange with SDG&E. The exchanges resulted in 297 SDG&E CARE participants being added to SoCalGas's CARE Program.

On May 5, 2011, the CPUC adopted D.11-05-020, which required certain water and energy utilities with overlapping service territories to share low-income customer information in order to increase the participation rates of eligible customers in low-income assistance programs offered by each other. In 2012, SoCalGas implemented a twice-yearly (March and September) CARE customer data exchange of CARE enrollments with all participating water companies in SoCalGas service territory. In 2020, as a result of the CARE All-Party Meeting,⁷⁵ SoCalGas increased the frequency of customer data exchange with participating water companies and added an additional effort in July 2020. In 2021, SoCalGas completed quarterly data exchanges with eligible and participating water utilities and added 1,523 CARE participants from the low-income water rate assistance program.

Joint Utility Program Managers Meeting: In PY2021, SoCalGas, SCE, PG&E, SDG&E and Southwest Gas scheduled monthly statewide CARE meetings and continued to meet at least quarterly via TEAMS to discuss CARE outreach efforts and program operation issues, the Low Income Application Decision, resolutions, and enhancements.

⁷⁵ Assigned Commissioner's Ruling in Response to May 22, 2020, All-Party Meeting On California Alternate Rates for Energy Outreach in Light of COVID, June 15, 2020.

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

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

In PY2021, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who are receiving benefits from the ESA Program are automatically enrolled for the CARE discount and PEV approved if their eligibility has been verified by the ESA Program. In PY2021, SoCalGas enrolled 2,285 ESA Program customers in CARE.

SoCalGas's GAF Program provides to qualified customers a one-time bill assistance payment for the amount of the current balance, not to exceed \$100. The annual, one-time bill payment assistance is available to eligible customers on a first-come, first-served basis. To assist customers in paying higher winter gas bills, the GAF Program typically begins in February and continues through the end of May each year, or until funds are depleted. In 2021, to assist with the economic challenges brought by the COVID-19 pandemic, SoCalGas's GAF program ran from 2/1/21 – 4/17/21 and then again from 5/28/21 – 10/4/21, and also from 12/6/21 and

has continued currently into 2022, until funds are depleted. The grant amount was increased from \$100 to \$200 to assist seniors 65 years of age and older and households impacted by the pandemic. The grant amount reverted back to \$100 after July 1, 2021.

The GAF Program has the same income eligibility guidelines as CARE; thus SoCalGas's GAF customer data and CARE customer data are interfaced. Customers participating in the GAF Program, but not in the CARE Program, are automatically enrolled in CARE. Additionally, because GAF customers provide proof of income when applying, customers approved for GAF are automatically PEV approved. Finally, CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their CARE eligibility again until the next two-year recertification cycle has lapsed. This process helps reduce barriers to participation and assists in retaining qualified customers. Through leveraging efforts with SoCalGas's GAF Program, SoCalGas enrolled 565 new participants in its CARE Program during PY2021.

In PY2021, the GAF Program provided \$540,020 in customer assistance to 3,897 customers. Funds for the program came from donations from customers, employees, and shareholders.

GAF Program PY2021	Shareholder Funded Distribution	Ratepayer Funded Distribution¹	Total YTD
Beginning Balance	\$1,951	\$0	\$1,951
Customer & Shareholder Contributions	\$708,206	\$0	\$708,206
SHARE Program Funds Transferred to GAF	\$0	\$0	\$0
Total Funds Available	\$708,206	\$0	\$708,206
Administrative Fees	\$60,738	\$0	\$60,738
GAF Payments	\$540,020	\$0	\$540,020
Remaining Balance	\$301,130	\$0	\$301,130
Customers Assisted (number)	3,897		3,897
Average Assistance	\$138.57		\$138.57

¹ There were no Ratepayer Funds used in PY2021.

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

CARE Outreach collaborates with the ESA Program at community events.

Prior to COVID-19 and restrictions on in-person event participation,

Outreach representatives were able to discuss multiple ways to save on

energy bills such as the CARE discount, weatherization, and/or repairs for

residences. These efforts will continue once in-person events are allowed

to resume.

Additionally, CARE Outreach collaborates extensively with CalFresh

program outreach. Efforts to reach and provide information on the CARE

Program to eligible customers occur at events such as FBO workshops

(e.g., Catholic Charities in Orange County) and with food banks (e.g.,

FIND Food bank which services Imperial and Riverside Counties, LAC +

USC Medical Center CAREs Programs, and Foodbank of Santa Barbara and Food Share Ventura County).

2.4.6.1 Track Costs of AB 793 related Energy Management

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

SoCalGas's CARE Program continues to update its My Account functionality allowing real-time CARE enrollment, CARE application processing, status updates, and facilitation of secure CARE recertification and PEV. In addition, customers are able to view cost to date as well as historical usage information on My Account.

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

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

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

For PY2021, SoCalGas did not receive low-income customer information or requests for CARE data from CSD. However, SoCalGas continued to receive LIHEAP payment information from CSD, which was used to apply LIHEAP payment assistance to a low-income customer's bill. For LIHEAP recipients, SoCalGas has an automated process in place that automatically PEV approves an account once a LIHEAP payment is posted to the account. Similarly, regarding GAF, once a GAF pledge is placed on an account, the customer is automatically PEV approved for CARE.

Through leveraging efforts, 1,189 customers who received LIHEAP payments and 565 customers who received a GAF pledge were PEV approved for CARE.

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

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

As of PY2019, SoCalGas outsourced the CARE mail intake and application scanning process to a third-party vendor, improving cost and operational efficiency. All CARE received mail is routed to the vendor that is responsible for opening envelopes, and sorting and scanning the documents. The scanned application images are then delivered to the CARE processing staff through secure FTP and processed through SoCalGas's existing system interface.

SoCalGas processed over 82,000 mailed applications (i.e., system generated, direct mail, and bill inserts) in PY2021 via its content management systems. SoCalGas continues to electronically manage all customer-returned documents for ease of processing and retrieval on its network. This improves program delivery when customers call with CARE inquiries and issues. The CARE processing staff can easily retrieve customer applications and manage issues accordingly.

SoCalGas continues to utilize best practices to maximize excellent customer service to support ease of enrollment, CARE approval, recertification, and PEV. Methods designed to increase enrollment and aid in the retention of CARE customers included CSR enrollment, web enrollment, IVR enrollment, mail, fax or email applications, outbound dial reminder calls, leveraging with internal and external low-income

programs, approval of CARE on accounts pending turn-on, and mailing of a second recertification and PEV application.

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

Immediate CARE approval on new accounts allows for preliminary CARE statuses (e.g., approved, incomplete, and denied) on accounts that are pending turn-on. As for leveraging, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes SDG&E and SCE CARE participant information to enroll customers. In PY2021, SoCalGas continued to focus on efficient enrollment channels including CSR, My Account, and SoCalGas CARE website enrollments.

Mail Second PEV Application: A second PEV application is mailed to customers who have not responded within 45 days to the initial request. Nonresponsive customers are removed from the CARE Program. As with the mailing of the first PEV application, customers again receive an automated call informing them that they must verify their eligibility and to

expect an application in the mail. Additionally, a bill message informs them that SoCalGas has not yet received their verification application and either proof of income or proof of participation in an assistance program.

If removed from CARE due to nonresponse, customers who wish to become re-enrolled must submit proof of income or proof of participation in a specific assistance program when their termination date is less than 24 months from the current date. When 24 months from PEV termination have lapsed, customers can become re-enrolled on the program by simply completing a self-certification application.

CSR CARE Enrollment: In 2021, SoCalGas continued to offer an invaluable, simplified method of immediate phone enrollment through CSRs, originally implemented in February of 2018. SoCalGas's CSRs offer CARE to customers during turn-on and payment extension calls. In 2021, the Customer Contact Center successfully enrolled 102,604 customers in CARE.

In its pursuit for continued improvement in customer service, SoCalGas is exploring ways to expand the category of customers who are enrolled by a CSR, and not limit it to turn-ons and payment arrangements. Such expansion could include offering CARE enrollment to customers who call regarding the AMP, or any billing related issues.

Mobile Home Park Utility Upgrade Program (MHP UUP):

Since program inception, 287 mobile home parks have converted from master-metered and sub-metered to direct utility, impacting over 20,000 tenants, and creating new SoCalGas customers. In 2021, 24 parks were converted to direct utility, resulting in 1,423 new SoCalGas customers. For these customers who are on CARE and MBL, the two programs have been seamlessly transferred to the tenants' new gas accounts for continued benefit of each program. As the MHP UUP account executives hold meetings at the respective parks to provide an overview of the MHP conversion, the account executives have continued to enroll additional tenants into CARE. An added benefit of the MHP UUP has been the conversion of master-metered accounts, where due to the meter configuration, the rate was not eligible for tenants to enroll in CARE. Once converted as SoCalGas customers, these tenants are now entitled to apply for the bill discount.

My Account: Since September of 2017 and implemented per D.17-12-009, CARE Program enrollment, recertification and PEV web applications have continued to be accessible within My Account in both English and Spanish, through 2021. CARE customers also have the option to opt-out of the program if they no longer qualify. Once customers log into My Account, their message center alerts them that they can apply to the CARE Program to see if they qualify, or that they are due for recertification or PEV, depending on their CARE status. Upon clicking the *Apply Now* link,

the users are taken to a dedicated CARE Program page within My Account. The CARE page is also accessible from the My Account homepage's left column and *Ways to Save* dropdown menu. From the CARE page, customers will see their current CARE status and may apply/recertify, submit verification or opt-out immediately. The enrollment, recertification and opt-out requests are processed in real-time, and users receive confirmation instantly upon completing the application. In addition to confirmation messages within the page, automated confirmation emails are also sent out. With the PEV application, customers can upload their required documents. Upon submission, users are notified within the page and via automated email that their application has been received and will be processed. PEV submissions are sent from the My Account database to the CARE Operations group for processing. Mobile versioning of the My Account CARE page was also made available.

This implementation has increased CARE enrollments, reduced manual processing of applications, and improved customer service by providing real-time status updates and application confirmation. Another added benefit is the opportunity to promote the ESA Program to CARE qualified customers who may also qualify for the ESA Program. Promotional images linked to the ESA Program page are included in the CARE enrollment approval confirmation message and emails. In PY2021,

SoCalGas processed a total of 95,542 applications received through My Account.

SoCalGas.com Website: Throughout 2021, the enhancement to the website, implemented in December of 2017, continued to be utilized, whereby online applications are processed in real-time, instead of during the previous overnight batch process. Additionally, all five languages' *Apply Now* links navigate to a dedicated CARE page outside of My Account in the respective languages. From there, customers may enter their account number and ZIP code, or look up their account number using their social security number. The customer will then be taken to the same My Account CARE page without having to log into My Account, and enroll, recertify or opt-out of CARE. In order to submit PEV and associated eligibility documentation, the customer needs to log into My Account. Mobile versioning of the SoCalGas CARE website was also made available.

In PY2021, SoCalGas processed a total of 33,719 web applications. This enhancement has improved customer service and sped up enrollments by providing instant confirmation.

2.5 Processing CARE Applications

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

Recertification of sub-metered tenants resumed following the lifting of COVID-19 protections, on July 1, 2021. The process for recertification of sub-metered tenants of master-metered accounts is the same as that of regular residential customers, meaning that recertification is required every two years, or every four years for customers on a fixed-income. The annual earnings of customers on a fixed income do not fluctuate significantly from year to year and requiring them to recertify every two years was an unnecessary burden. In PY2008, as authorized by the CPUC in D.06-12-038,⁷⁶ SoCalGas implemented a four-year recertification period for customers receiving Social Security, pension, Supplemental Security Income, Social Security Disability, State Supplemental Program, and/or Medi-Cal benefits.

Tenants due to recertify are run through SoCalGas's Probability Model. Those with a probability score of greater or equal to 0.5 are granted Recertification Soft Approval and may stay on CARE for an additional two years. Those with a probability score of greater than or equal to 0.3 but less than 0.5 are mailed a recertification application.

⁷⁶ See D.06-12-038.

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

1. Visit socalgas.com/care and apply as a sub-metered tenant.
2. Call **1-866-716-3452** anytime 24 hours a day, with facility ID ready.
3. Return the completed and signed form by mail or fax to **(213) 244-4665**.

Recertification requires the tenant to provide the number of household occupants, total annual household income, or participation in a public assistance program.

Applications received via U.S. mail are opened, scanned, and validated for processing efficiency. Tenants are informed they have 90 days to respond to the recertification request, however, SoCalGas allows 100 days to account for weekends and non-business days. For tenants who have not responded to the recertification request within 45 days of the initial mailing, a second reminder is sent. Non-responsive tenants are removed from CARE. If the recertification is received and approved after the 90-day timeframe, the tenant is re-enrolled in CARE.

The monthly *Add & Delete* report is mailed to each sub-metered facility notifying the facility of any tenants who were recently added to CARE or removed from the program. Additionally, each facility receives a complete monthly listing of its CARE tenants. In addition to CARE tenants, the listing also includes names and space numbers of those on MBL. The listing coincides with the mailing of the bill and is used to appropriately distribute the CARE discount and/or extra therms to those found eligible for the programs.

The automatic monthly mailing of tenants on CARE and MBL has almost eliminated the daily phone calls from mobile home parks requesting a listing of tenants on the two assistance programs.

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

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

In PY2021, SoCalGas worked with 35 community partners and 32 total, but 3 active capitation agencies, as well as one third party outreach contractor to help eligible non-participating customers sign up for the CARE Program. The non-profit CARE Capitation agencies employed a “one-stop-shop” approach by helping their clients complete a CARE application, while also assisting the customers in enrolling in other programs they might be eligible for.

SoCalGas’s third party CARE outreach contractor employed a variety of outreach strategies, such as door-to-door solicitation, local community event participation, and program material distribution to help customers apply for CARE. Many of the customers targeted by the third-party CARE contractor do not respond to traditional forms of outreach, do not visit CBO facilities, and are much more receptive to door-to-door canvassing efforts. In PY2021, SoCalGas assigned specific counties to the third-party outreach contractor so they could focus on less penetrated SoCalGas territories and provide better customer service.

During PY2021, the number of customers enrolled in CARE by SoCalGas’s CARE Capitation CBOs was 32 customers, and 11,117 new enrollments were derived from CARE’s third-party canvassers’ efforts.

2.6 Program Management

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

SoCalGas's CARE Program did not experience any serious issues or events that significantly affected program management during PY2021.

2.7 Pilots

No CARE pilots were conducted in PY2021.

2.7.1 Establishment of CHANGES Program Pilot

There were no CHANGES pilots in 2021.

2.8 Studies

See section 1.8.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

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

See CARE Table 12 in the attachments.

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

There were 32,708 residents in the non-residential CARE Expansion Program facilities, comprised of 663 primary facilities with 666 associated satellite facilities, and 50 farmworker housing facilities participating in the CARE Expansion Program at PY2021 year-end.

3.2 Usage Information

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

See CARE Table 12 in the attachments.

3.3 Program Costs

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

SoCalGas incurred \$1,062.35 in marketing expenses for 6,169 CARE Non-Profit Group Living (NPGL) facilities bill inserts in PY2021. Due to the small number of participants, SoCalGas did not track administrative labor costs for new CARE Expansion applications received during PY2021.

3.3.2 Discount Information.

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

The average annual discount received per participating CARE residential facility in PY2021 was \$98.53.⁷⁷

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

The average annual discount received per participating CARE Expansion Program facility in PY2021 was \$570.71.⁷⁸

3.4 Outreach

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

Annually, SoCalGas sends a bill insert to commercial customers informing them of the NPGL Rate. In addition, SoCalGas worked with Public Affairs personnel in rural counties to promote program awareness for low-

⁷⁷ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

⁷⁸ *Id.*

income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Radio Campesina in Visalia and Bakersfield to reach farm workers. During PY2021, Radio Campesina provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Food, musical entertainment, and information from SoCalGas regarding the CARE Program are part of these lunch break sessions. Due to continued COVID-19 restrictions, SoCalGas was unable to participate in community events and local school events. In lieu of in-person events, community partners increased the SoCalGas social media presence.

3.4.2 Discuss each of the following: The Expansion Program outreach

SoCalGas used a variety of channels to increase awareness of the CARE Program in PY2021. Among those channels were agricultural workers and those living in commercial facilities. In October 2021, SoCalGas also sent out a bill insert to approximately 6,169 eligible customers. This bill insert described the CARE rate for the expansion program. In past years, SoCalGas also leveraged the relationships of its Public Affairs personnel in developing grassroots relationships with organizations such as Radio Campesina and MICOP that work closely with agricultural and migrant workers in order to continue to educate members about SoCalGas's Customer Assistance Programs.

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

In PY2021, the CCC continued to be an effective outreach method for SoCalGas's CARE Expansion Program. In this model, customers who call to establish gas service, or make payment arrangements, speak with CSRs who present CARE Program information to them and respond to questions. Social service networks also continue to be another valuable communication medium to promote CARE Program information to CARE Expansion customers. A senior account executive in SoCalGas's New Construction Department worked with the developers of Project Homekey, a program that deals with converting hotels and motels into housing for the homeless population. Through this partnership, 14 newly established accounts were successfully enrolled in CARE as non-profit group living facilities. Additionally, word of mouth led the account executive to PATH (People Assisting the Homeless), resulting in the enrollment of 6 additional non-profit group living facilities.

In 2019, SoCalGas enhanced its ability to find possible new Expansion Program accounts and continued with this process through 2021. An automatic emailed report to the CARE processing team provides a list of Expansion Program accounts that have recently closed and where another customer has

established service at the facility. An application is mailed to the new accounts. This has proven effective in the enrollment of additional non-profit accounts. CARE Expansion Program applications are available at socalgas.com/care in downloadable .pdf format.

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

There was no facility data sharing during PY2021.

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

SoCalGas is not aware of barriers to participation in PY2021. A knowledgeable, full-time SoCalGas employee, dedicated solely to the Expansion Program, processes applications as they are received. Incomplete applications are followed-up with a phone call or correspondence to the customer, resulting in CARE approval of qualified accounts.

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

In its 2021-2026 Low Income Application, SoCalGas requested consideration of a four-year recertification period for the Expansion Program to decrease processing time, cost-savings in reduced paper and postage, and increased customer satisfaction. This was approved per

D.21-06-015 as the IOUs were instructed to implement a four-year recertification process.⁷⁹ As a result, these facilities were not asked to recertify in 2021. However, 70 facilities automatically mailed in all of the necessary documentation and were recertified in 2021.

As per the decision, the facilities are required to recertify eligibility every four years.⁸⁰ Correspondence containing a recertification application, postage-paid envelope, and an instruction letter will continue to be mailed to the facilities, when recertification resumes in 2024. Among other directions, the letter states that the facility must include a short statement specifying how the CARE Program savings were used for the benefit of the residents at the facility. The application is easy to understand, and the majority of applicants include the necessary qualifying documentation, with no further follow-up needed. The facilities are familiar with this routine and submit what is requested. Applications are processed in a timely manner when they are received.

3.5 Program Management

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

SoCalGas's CARE Program did not experience any issues or events that significantly affected program management during PY2021.

⁷⁹ D.21-06-015, OP 27.

⁸⁰ *Id.*

4. FUND SHIFTING

- 4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-02, D. 17-12-009 and D. 21-06-015.**

See ESA Table 12.

- 4.2 Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-022, D.17-12-009 and D. 21-06-105.**

See CARE Table 1.

- 4.3 Was there any Energy Savings Assistance Programs or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D. 10-10-008, D. 16-11-022, D.17-12-009 and D. 21-06-015.**

Any shifting activity performed in PY2021 is in compliance with fund shifting rules as laid out in D.12-08-044, D.16-11-022 and D.17-12-009.

5. COMMONLY USED ACRONYMS

AB		Assembly Bill
AE		Account Executive
AL		Advice Letter
AMP		Arrearage Management Plan
BPO		Branch Payment Office
CAM		Common Area Measure
CAP		Customer Assistance Program
CARE		California Alternate Rates for Energy
CBO		Community Based Organization
CCC		Customer Contact Center
CE		Categorical Eligibility
CETF		California Emerging Technology Fund
CHANGES		Community Help and Awareness with Natural Gas and Electricity
CPUC		California Public Utilities Commission
CSD		California Department of Community Services and Development
CTR		Click-through Rate
CSR		Customer Service Representative
CVA		Combustion & Ventilation Air
D.		Decision
DAC		Disadvantaged Community
E&A		Enrollment & Assessment
ED		Energy Division
EE		Energy Efficiency
ESA		Energy Savings Assistance Program
FBO		Faith Based Organization
FPG		Federal Poverty Guideline
GAF		Gas Assistance Fund
HCS		Health, Comfort & Safety
HE		High Efficiency
HEAT		Home Energy Assistance Tracking
HER		Home Energy Report
HHS		Health & Human Services
HISR		Home Improvement Salesperson Registration
HVAC		Heating, Ventilation, Air Conditioning

IOU		Investor-Owned Utility
IT		Information Technology
IVR		Integrated Voice Recognition
LADWP		Los Angeles Department of Water and Power
LEP		Limited English Proficient
LIEE		Low Income Energy Efficiency
LIHEAP		Low Income Home Energy Assistance Program
LINA		Low Income Needs Assessment
LIWP		Low Income Weatherization Program
MBL		Medical Baseline
MF		Multifamily
M&O		Marketing & Outreach
NEB		Non-energy Benefit
NGAT		Natural Gas Appliance Testing
NMEC		Normalized Metered Energy Consumption
PEV		Post Enrollment Verification
PG&E		Pacific Gas and Electric Company
POA		Property Owner Authorization
PPRS		Post-Pandemic Return to Service
PY		Program Year
SB		Senate Bill
SCE		Southern California Edison Company
SD&GE		San Diego Gas & Electric Company
SEC		Service Establishment Charge
SoCalGas		Southern California Gas Company
SPOC		Single Point of Contact
WNA		Whole Neighborhood Approach

6. APPENDIX A: COLLATERAL MATERIALS

6.1 ESA Program Tables

ESA Program- Table 1 - Overall Program Expenses

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

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

Summary

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

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

ESA Program- Table 3 - Cost Effectiveness

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

ESA Program- Table 5 - Direct Purchases & Installation Contractors

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

ESA Program- Table 7 - Expenditures Recorded by Cost Elements

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

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

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

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

ESA Program- Table 12 - Fund Shifting

ESA Program- Table 13 - Categorical and Other Enrollment

ESA Program- Table 14 - Leveraging & Integration

ESA Program – Table 15 - Expenditures for Pilots and Studies

ESA Program – Table 16 - Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)

ESA Program – Table 17 – Contractor Advanced Funding and Repayment

ESA Program – Table 18 – Customer Segment/Need State

ESA Program - Table 19 – Tribal Outreach

6.2 CARE Tables

CARE Table 1 - Overall Program Expenses

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

CARE Table 3 - Verification

CARE Table 4 - Self Certification and Re-Certification

CARE Table 5 - Enrollment by County

CARE Table 6 - Recertification Results

CARE Table 7 - Capitation Contractors

CARE Table 8 - Participants as of Month End

CARE Table 9 - Average Monthly Usage & Bill

CARE Table 10 - Surcharge & Revenue

CARE Table 11 - Capitation Applications

CARE Table 12 - Expansion Program

CARE Table 13 - High Usage Verification Results

CARE Table 13A - Customer Usage and ESA Program Treatment

CARE Table 14 - Categorical Enrollment

**Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
SOUTHERN CALIFORNIA GAS COMPANY
PY 2021 Summary Highlights**

2021 Energy Savings Assistance Program Summary			
2021	Authorized / Planning Assumptions	Actual	%
Budget ¹	\$134,133,334	\$111,430,005	83%
Funded from 2009-2016 Unspent Funds ²	\$15,602,885	\$1,480,349	9%
Summary Homes Treated	120,000	131,745	110%
Summary kWh Saved	N/A	N/A	N/A
Summary kW Demand Reduced	N/A	N/A	N/A
Summary Therms Saved ⁵	N/A	920,685	N/A
First Touches Homes Treated ³	60,000	66,406	111%
- kWh Saved	N/A	N/A	N/A
- kW Demand Reduced	N/A	N/A	N/A
- Therms Saved ⁵	N/A	464,025	N/A
Go-Backs/Retreated Homes ⁴	60,000	65,339	109%
- kWh Saved	N/A	N/A	N/A
- kW Demand Reduced	N/A	N/A	N/A
- Therms Saved ⁵	N/A	456,660	N/A

¹ Budget reflects the authorized funding in D.21-06-015. Additional ESA funds allocated from prior-cycle AL 5558 dated Dec 19, 2018.

² D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds.

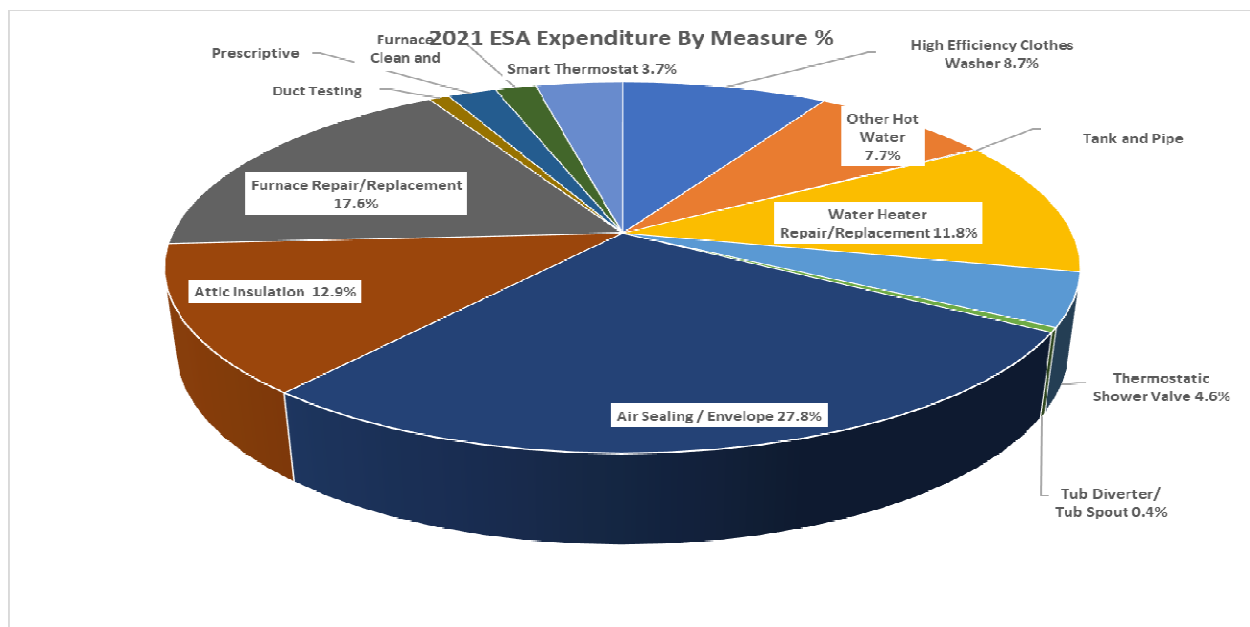
³ Based on delta between Summary of Homes treated and Go-backs/Retreated Homes.

⁴ Authorized / Planning Assumption based on Bridge year AL 5501-A.

⁵ 2021 authorized therms savings not identified in either D.21-06-015 or AL 5501-A..

2021 CARE Program Summary			
2021	Authorized Budget	Actual	%
Administrative Expenses	\$ 9,859,663	\$ 7,800,126	79%
Subsidies	\$ 134,475,311	\$ 178,416,136	133%
Service Establishment Charge	\$ 3,914,673	\$ 2,613,496	67%
Total Program Costs and Discounts	\$ 148,249,647	\$ 188,829,758	127%
2021 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	80,927	82,202	107,385
2021 CARE Enrollment	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	1,715,832	1,815,711	106%

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



PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 1
ESA Program Overall Program Expenses
SOUTHERN CALIFORNIA GAS COMPANY

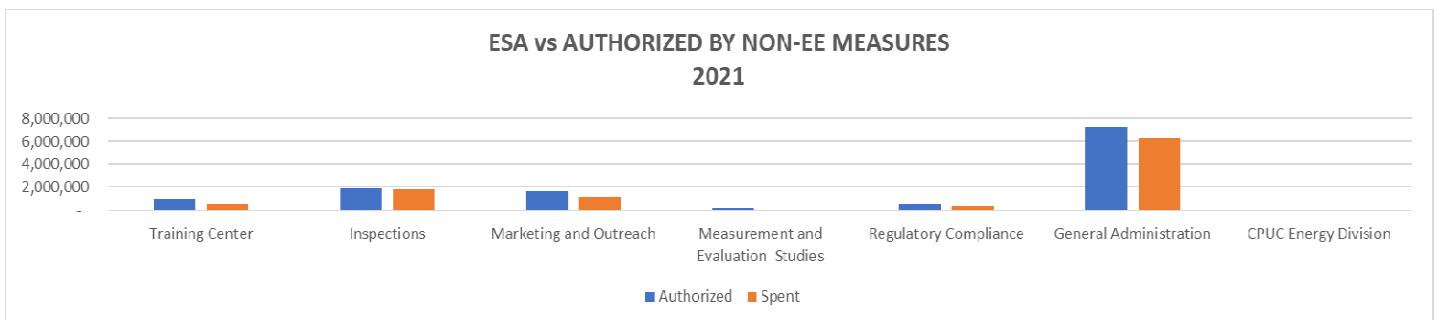
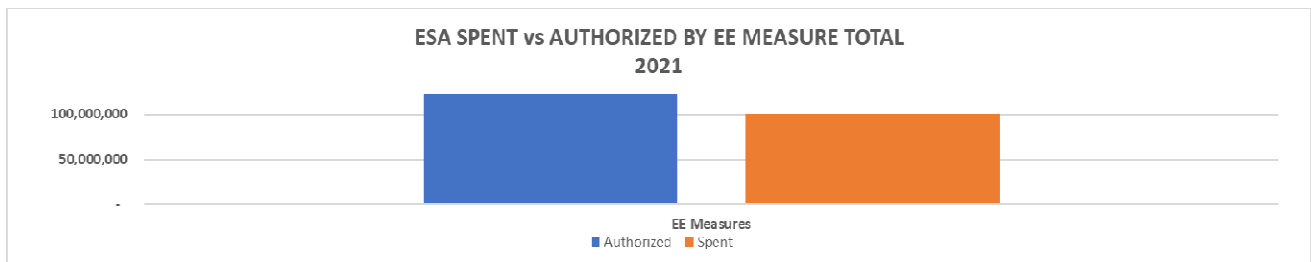
	2021 Authorized Budget ¹			2021 Annual Expenses ⁴			% of Budget Spent		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
Appliances	N/A		\$ -	N/A	\$ 5,884,981	\$ 5,884,981	N/A	0%	0%
Domestic Hot Water	N/A		\$ -	N/A	\$ 18,044,619	\$ 18,044,619	N/A	0%	0%
Enclosure	N/A		\$ -	N/A	\$ 29,200,616	\$ 29,200,616	N/A	0%	0%
HVAC	N/A		\$ -	N/A	\$ 17,510,759	\$ 17,510,759	N/A	0%	0%
Maintenance	N/A		\$ -	N/A	\$ 1,251,990	\$ 1,251,990	N/A	0%	0%
Lighting	N/A		\$ -	N/A		\$ -	N/A	0%	0%
Miscellaneous ²	N/A		\$ -	N/A	\$ (1,703,249)	\$ (1,703,249)	N/A	0%	0%
Customer Enrollment	N/A		\$ -	N/A	\$ 29,138,390	\$ 29,138,390	N/A	0%	0%
In Home Education	N/A		\$ -	N/A	\$ 1,746,929	\$ 1,746,929	N/A	0%	0%
Pilot	N/A		\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Energy Efficiency TOTAL	N/A	\$ 121,525,214	\$ 121,525,214	N/A	\$ 101,075,034	\$ 101,075,034	N/A	83%	83%
Training Center	N/A	\$ 1,007,987	\$ 1,007,987	N/A	\$ 559,980	\$ 559,980	N/A	56%	56%
Inspections	N/A	\$ 1,948,590	\$ 1,948,590	N/A	\$ 1,811,637	\$ 1,811,637	N/A	93%	93%
Marketing and Outreach	N/A	\$ 1,590,373	\$ 1,590,373	N/A	\$ 1,195,256	\$ 1,195,256	N/A	75%	75%
Statewide Marketing Education and Outreach	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Measurement and Evaluation Studies	N/A	\$ 112,500	\$ 112,500	N/A	\$ 25,738	\$ 25,738	N/A	23%	23%
Regulatory Compliance	N/A	\$ 578,835	\$ 578,835	N/A	\$ 396,719	\$ 396,719	N/A	69%	69%
General Administration	N/A	\$ 7,262,335	\$ 7,262,335	N/A	\$ 6,254,603	\$ 6,254,603	N/A	86%	86%
CPUC Energy Division ³	N/A	\$ 107,500	\$ 107,500	N/A	\$ 111,040	\$ 111,040	N/A	103%	103%
TOTAL PROGRAM COSTS	N/A	\$ 134,133,334	\$ 134,133,334	N/A	\$ 111,430,005	\$ 111,430,005	N/A	83%	83%
Funded Outside of ESA Program Budget									
Indirect Costs					\$ 3,328,289	\$ 3,328,289			
NGAT Costs					\$ 1,064,369	\$ 1,064,369			

¹ Reflects the authorized funding in D.21-06-015 and AL 5501-G-A. Additional funds allocated from prior-cycle unspent budgets as ordered in AL 5558 dated December 19, 2018 are not shown on this table but appear on Table 1A.

² Total current and y-t-d expenses are related to contractor advance payment and credit-back re-payment balance associated with COVID - 19.

³ Total 2021 CPUC oversight expense over authorized budget due to CPUC billed costs vs 2021 budget, but still within overall 2021-2026 cycle budget.

⁴ Total program cost stated here does not include MF-CAM and M&E costs funded out of unspent funds from previous cycle in the amount of \$1,444,936 and \$35,413 respectively. (See Tbl 1A) Total 2021 ESA program cost including MF CAM and M&E equals \$111,430,005 + \$1,444,936 + \$35,413 = \$112,910,354.



PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 1A
Expenses Funded from 2009-2016 Unspent Program Funds
SOUTHERN CALIFORNIA GAS COMPANY

	2017-2021 Authorized Budget ¹			2021 Annual Expenses			% of Budget Spent		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
M&E Studies ¹	N/A	\$ 125,000	\$ 125,000	N/A	\$ 35,413	\$ 35,413	N/A	28.33%	28.33%
Multi-Family ²	N/A	\$ 15,477,885	\$ 15,477,885	N/A	\$ 1,444,936	\$ 1,444,936	N/A	9.34%	9.34%
TOTAL UNSPENT PROGRAM COSTS ¹	N/A	\$ 15,602,885	\$ 15,602,885	N/A	\$ 1,480,349	\$ 1,480,349	N/A	9.49%	9.49%

¹ M&E LINA Study funded out of prior cycle unspent funds per AL 5558.

² D.21-06-015 specifically directed funding for Multi-Family to come from unspent 2009-2016 ESA Program funds and this table does not include unspent funds from the 2017-2020 cycle.
Budget is derived from MF authorized budget of \$18,000,000 - (2018 - Dec 2020) of \$2,522,115) = \$15,477,885.

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 2
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

	ESA Program (Summary)Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) ⁸						
	Units	Year-To-Date Completed & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh ¹ (Annual)	kW ¹ (Annual)	Therms ¹ (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh ¹ (Annual)	kW ¹ (Annual)	Therms ¹ (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh ¹ (Annual)	kW ¹ (Annual)	Therms ¹ (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh ¹ (Annual)	kW ¹ (Annual)	Therms ¹ (Annual)	Expenses (\$)	% of Expenditure
Measures		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																						
Appliances																												
High Efficiency Clothes Washer	Home	7,369	-	-	146,647	\$ 6,272,126	6.2%	Home	3,995	-	-	79,652	\$ 3,402,136	6.5%	Home	3,374	-	-	66,996	\$ 2,869,990	5.8%	Home	2,859	-	-	57,263	\$ 2,433,944	5.0%
Microwaves ²	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Freezers	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water																												
Other Hot Water ³	Home	131,420	-	-	415,156	\$ 5,603,352	5.5%	Home	66,096	-	-	208,797	\$ 2,791,624	5.4%	Home	65,324	-	-	206,359	\$ 2,811,727	5.7%	Home	79,443	-	-	250,961	\$ 3,079,762	6.3%
Tank and Pipe Insulation ⁴	Home	1,746	-	-	11,087	\$ 73,717	0.1%	Home	923	-	-	5,861	\$ 39,990	0.1%	Home	823	-	-	5,226	\$ 33,726	0.1%	Home	702	-	-	4,458	\$ 27,986	0.1%
Water Heater Repair/Replacement	Home	4,159	-	-	9,940	\$ 8,548,381	8.4%	Home	2,346	-	-	5,607	\$ 4,831,789	9.3%	Home	1,813	-	-	4,333	\$ 3,716,592	7.5%	Home	9,270	-	-	22,155	\$ 2,421,558	4.9%
Thermostatic Shower Valve	Each	71,083	-	-	115,865	\$ 3,342,352	3.3%	Each	31,937	-	-	52,057	\$ 1,499,713	2.9%	Each	39,146	-	-	63,808	\$ 1,842,639	3.7%	Each	40,222	-	-	65,562	\$ 1,886,118	3.9%
New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Tub Diverter/ Tub Spout	Each	2,704	-	-	15,196	\$ 312,294	0.3%	Each	1,167	-	-	6,559	\$ 136,784	0.3%	Each	1,537	-	-	8,638	\$ 175,510	0.4%	Each	967	-	-	5,435	\$ 111,496	0.2%
Enclosure																												
Air Sealing / Envelope ⁵	Home	132,537	-	-	61,954	\$ 20,074,373	19.7%	Home	66,314	-	-	29,720	\$ 8,952,106	17.2%	Home	66,223	-	-	32,234	\$ 11,122,267	22.4%	Home	77,611	-	-	56,557	\$ 10,074,872	20.6%
Attic Insulation	Home	4,847	-	-	148,101	\$ 9,361,888	9.2%	Home	2,594	-	-	80,625	\$ 5,225,806	10.0%	Home	2,253	-	-	67,476	\$ 4,136,082	8.3%	Home	2,421	-	-	60,062	\$ 4,209,370	8.6%
HVAC																												
Furnace Repair/Replacement	Home	7,174	-	-	(248,433)	\$ 12,531,759	12.3%	Home	3,010	-	-	(101,028)	\$ 5,257,959	10.1%	Home	4,164	-	-	(147,405)	\$ 7,273,800	14.7%	Home	3,790	-	-	(161,030)	\$ 6,129,495	12.5%
Room A/C Replacement	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Central A/C replacement	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Evaporative Cooler	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	1,576	-	-	17,509	\$ 616,910	0.6%	Home	902	-	-	10,021	\$ 352,226	0.7%	Home	674	-	-	7,488	\$ 264,684	0.5%	Home	551	-	-	6,122	\$ 156,163	0.3%
Energy Efficient Fan Control A/C Time Delay	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Prescriptive Duct Sealing	Home	13,936	-	-	154,829	\$ 1,484,263	1.5%	Home	7,785	-	-	86,491	\$ 842,147	1.6%	Home	6,151	-	-	68,338	\$ 642,116	1.3%	Home	3,450	-	-	38,330	\$ 358,322	0.7%
High Efficiency Forced Air Unit (HE FAU)	Home	68	-	-	1,103	\$ 212,162	0.2%	Home	42	-	-	839	\$ 130,375	0.3%	Home	26	-	-	265	\$ 81,786	0.2%	Home	22	-	-	454	\$ 70,964	0.1%
New - Blower Motor Retrofit	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Maintenance																												
Furnace Clean and Tune	Home	21,688	-	-	(26,676)	\$ 1,253,396	1.2%	Home	11,269	-	-	(13,861)	\$ 667,984	1.3%	Home	10,419	-	-	(12,815)	\$ 585,413	1.2%	Home	8,604	-	-	(10,583)	\$ 470,358	1.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Lighting																												
Lighting	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - LED Diffuse A-Lamps	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Bulbs (PAR/BR)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Torchieres	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Exterior Hardwired Fixtures	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Internal Hardwire	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Miscellaneous																												
Pool Pumps	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Smart Thermostat	Home	10,218	-	-	21,865	\$ 2,648,352	2.6%	Each	6,013	-	-	12,901	\$ 1,590,354	3.0%	Each	4,205	-	-	8,964	\$ 1,057,998	2.1%	Each	2,296	-	-	4,160	\$ 578,237	1.2%
Customer Enrollment																												
Outreach & Assessment	Home	152,366				\$ 27,926,092	27.4%	Home	77,678				\$ 15,750,850	30.2%	Home	74,688				\$ 12,175,242	24.5%	Home	87,182				\$ 15,987,364	32.7%
In-Home Education	Home	97,172				\$ 1,483,318	1.5%	Home	44,394				\$ 676,819	1														

¹ As of September 2019, all savings are calculated based on the following source:
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 Other Hot Water measures include Faucet Aerators and Low Flow Showerheads

⁴ Tank and Pipe Insulation 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

⁷ Authorized bridge period homes treated goal for January-June 2021 per AL 5501. Authorized homes treated goal for July-December 2021 per D.21-06-015.

⁸ Data for Aliso Canyon includes "First Touches and Re-Treatments".

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 2B
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

ESA CAM Measures ^{2,3}	ESA Program - Multifamily Common Area ¹						
	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$) ¹¹	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Home	-	-	-	-	\$ -	0.0%
Microwaves ⁴	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%
							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	Cap-kBTUh	11	-	-	10,140	\$ 100,820	6.6%
Boiler Replace	Cap-kBTUh	29	-	-	66,400	\$ 1,432,078	93.4%
Enclosure							
Air Sealing / Envelope ⁵	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 ⁶	Home	-	-	-	-	\$ -	0.0%
Audit ⁷	Home	-	-	-	-	\$ -	0.0%
Administration ⁸	Home	-	-	-	-		0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home	-					0.0%
In-Home Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	76,540	\$ 1,532,898	

Multifamily Properties Treated	Number
Total number of Multifamily Properties Treated ⁹	17
Subtotal of Master-metered Multifamily Properties Treated	24
Total Number of Multifamily Tenant Units w/in Properties Treated ¹⁰	1,386

ESA Program - Multifamily Common Area	Year to Date Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ -	\$ -
Direct Implementation (Non-Incentive) ¹³	\$ -	\$ -	\$ -
Direct Implementation ¹²	\$ -	\$ 1,444,936	\$ 1,444,936
TOTAL MF CAM COSTS	\$ -	\$ 1,444,936	\$ 1,444,936

<<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

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

⁴ Microwave savings are from ECONorthWest Studies received in December of 2011.

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

⁷ 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.

⁸ 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.

⁹ Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

¹⁰ 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.

¹¹ Expenses for measures include equipment and installation costs only; expenses reflects total project equipment and installation and a portion of the project cost may have been billed and paid in the following year and is not reflected in the total MF CAM COSTS on line 70.

¹² Includes expenditures for projects from 2020; partial payment for projects completed in 2021 and may have been included costs for projects in 2019 projects that were billed in 2020.

¹³ Master meter account may have several pieces of equipment attached and does not reflect the total number of buildings served by the equipment. In some cases, the master meter account encompasses multiple buildings and/or dwellings.

	A	B	C	D	E
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 3 Program Cost Effectiveness SOUTHERN CALIFORNIA GAS COMPANY				
2	Ratio of Benefits Over Costs			Net Benefits \$	
3	ProgramYear	ESACET	Resource TRC	ESACET	Resource TRC
4	2021	0.34	0.26	\$ (70,692,360)	\$ (28,778,859)
5	Notes: - All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC. - The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs. - The Resource TRC includes energy benefits and program measure and installation costs. - Adopts the 2019 ESA Impact Evaluation. The results from that study were used in this Annual Report. - Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.				
6					
7					
8					
9					
10					
11					

Detail by Housing Type and Source ¹
SOUTHERN CALIFORNIA GAS COMPANY

² As of September 2019, all savings are calculated based on the following source:
DNV-GL “Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017.” April 26, 2019.

³ Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. Also it includes first touches, go-back/retreatment, and CSD leveraging authorized in D.16-11-022 and D.17-12-009.

⁴ Ineligible & Unwilling defined in ESA Table 8.

⁵ Based on Attachment F of D.12-08-044, D.14-08-030, and Ordering Paragraph 79 of D.16-11-022.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2021	PG&E	86,754	3,364
2021	SCE	1,064,437	44,116
2021	SDG&E	14,752	6

	A	B	C	D	E	F	G
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 5 ESA Program Direct Purchases & Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY						
2			Contractor Type				2021 Annual Expenditures ²
3			(Check one or more if applicable)				
4	Contractor	County ¹	Private	CBO	WMDVBE	LIHEAP	
5	ADVANCED CONTRACTING SERVICES INC	F, Ke, Ki, LA, SLO, T, V	x	-	-	-	\$ 238,444
6	ARCA RECYCLING INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	x	-	-	-	\$ 6,272,126
7	ASSERT INC	LA, Sbe, V	x	-	-	-	\$ 1,042,562
8	ASSOCIATED CONSTRUCTION SERVICES	LA, OC, R, Sbe	x	-	x	-	\$ 1,907,601
9	AVALON CARVER COMMUNITY CENTER INC	LA	-	x	-	-	\$ 248,820
10	CAMPESINOS UNIDOS INC	I, R, Sbe	x	-	x	x	\$ 894,486
11	CARROLLCO INC	F, Ki, T	x	-	x	-	\$ 271,953
12	COMMUNITY ACTION PARTNERSHIP OF O C	OC	-	x	x	-	\$ 40,722
13	COMMUNITY OUTREACH SERVICES	Ke, Ki, T	x	-	x	-	\$ 19,703
14	EAGLE SYSTEMS INTERNATIONAL INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	-	x	-	-	\$ 5,845,249
15	EAST LOS ANGELES COMMUNITY UNION	I, LA, OC, R, Sbe	-	x	-	-	\$ 17,914,562
16	ECO SERVICES	I, LA, R, Sbe, Sba, SLO, V	x	-	-	-	\$ 2,717,868
17	ECONO WEST INC	LA, OC, Sbe, Sba, SLO, V					\$ 1,320,365
18	ENVIRONMENTAL ASSESSMENT SERVICES	I, LA, OC, R, Sbe, V					\$ 3,653,888
19	FCI MANAGEMENT CONSULTANTS	LA					\$ 227,648
20	GARCIA & SONS HOME IMPROVEMENT INC	F, Ke, Ki, LA, T	-	x	x	-	\$ 272,621
21	GREEN ENERGY SOLUTIONS	OC, R, Sbe	x	-	x	-	\$ 215,599
22	JOHN HARRISON CONTRACTING INC	I, Ki, LA, R, Sbe, T	-	x	-	-	\$ 1,094,165
23	LOTUS CONSTRUCTION & PROPERTY	I, LA, OC, R, Sbe, V	x	-	-	-	\$ 406,357
24	MARAVILLA FOUNDATION	I, Ke, LA, OC, R, Sbe	-	x	x	x	\$ 9,887,223
25	NRG MKTG LLC	LA	x	-	x	-	\$ 304,989
26	OAKRIDGE ENERGY INC	I, LA, R, Sbe	x	-	x	-	\$ 297,486
27	PACIFIC COAST ENERGY CONSERVATION	Ke, Sbe, SLO	x	-	-	-	\$ 838,989
28	PROTEUS INC	F, Ke, Ki, LA, Sbe, Sba, T, V	x	-	x	-	\$ 4,966,301
29	QUALITY CONSERVATION SERVICES	LA, OC, R, Sbe	x	-	x	-	\$ 7,210,622
30	RELIABLE ENERGY MANAGEMENT INC	F, Ke, Ki, LA, OC, R, Sbe, T, V	x	-	x	-	\$ 13,320,743
31	RICHARD HEATH & ASSOCIATES INC	I, Ke, Ki, LA, OC, R, Sbe, Sba, V	x	-	x	-	\$ 1,330,422
32	SIERRA WEATHERIZATION COMPANY INC	LA, R, Sbe, V	x	-	x	-	\$ 8,124,361
33	SILICON VALLEY FOUNDATION	LA, OC, R, Sbe	x	-	x	-	\$ 4,628,429
34	SOCO AIR CONDITIONING COMPANY	LA, OC, R, Sbe	-	-	x	-	\$ 331,893
35	SPECIALTY AC HEAT INC	LA, OC	x	-	x	-	\$ 2,021,571
36	STAPLES & ASSOCIATES	Ke, LA	x	-	x	-	\$ 1,015,203
37	TONY'S HEATING & A/C SERVICE INC.	LA, Sbe	-	x	x	-	\$ 1,122,064
38	TRI-STATE HOME IMPROVEMENTS INC	LA, Ri, Sbe	-	x	x	-	\$ 105,647
39	TRUTEAM OF CALIFORNIA	I, LA, OC, R, Sbe	x	-	-	-	\$ 3,690,495
40	VETERANS IN COMMUNITY SERVICES INC	LA, OC, R, Sbe	x	-	-	-	\$ 998,835
41	WATTS LABOR COMMUNITY ACTION COMM	LA	-	x	x	-	\$ 54,904
42	Total Contractor Expenditures						\$ 104,854,918
43	¹ Key	<u>Abbreviation</u>					
44	Alameda	AL					
45	Los Angeles	LA					
46	Orange County	OC					
47	Ventura	V					
48	San Bernadino	Sbe					
49	Riverside	R					
50	Imperial	I					
51	Tulare	T					
52	Kings	Ki					
53	Kern	Ke					
54	Santa Barbara	Sba					
55	San Luis Obispo	SLO					
56	Fresno	F					
57	San Diego	SD					
58	San Fernando	SFERN					
59	Santa Clara	SC					
60	San Francisco	SF					
61	Santa Cruz	Scr					
62	Contra Costa	CC					
63	Solano	S					
64	² The expenditures do not include a credit for the high efficiency clothes washer rebates from Municipal Water Companies - (\$386,562), misc revenues credit for cash collected - (\$183,520), and contractor repayment credits - (\$1,703,249). ESA Tbl 7 contractor total of \$102,581,587 is calculated as follows: \$104.854,918 - (\$386,562) - (\$183,520) - (\$1,703,249) = \$102,581,587. (See "Contractor" column ESAP Table - 7)						

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 6
ESA Program Installation Cost of Program Installation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2021 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs ¹	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Home	88,214	67%	88,214	67%	\$ 47,359,719	47%	43,531	33%	43,531	33%	\$ 54,385,017	53%	131,745	131,745	\$ 101,744,735	\$ 772	\$ 772
Appliances																		
High Efficiency Clothes Washer	Home	-	0%	-	0%	\$ -	0%	7,369	100%	7,369	100%	\$ 6,272,126	100%	7,369	7,369	\$ 6,272,126	\$ 851	\$ 851
Microwaves	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Refrigerators	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Freezers	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Domestic Hot Water																		
Other Hot Water	Home	91,195	69%	91,195	69%	\$ 3,419,357	61%	40,225	31%	40,225	31%	\$ 2,183,995	39%	131,420	131,420	\$ 5,603,352	\$ 43	\$ 43
Tank and Pipe Insulation	Home	918	53%	918	53%	\$ 33,706	46%	828	47%	828	47%	\$ 40,011	54%	1,746	1,746	\$ 73,717	\$ 42	\$ 42
Water Heater Repair/Replacement	Home	1,258	30%	1,258	30%	\$ 2,532,766	30%	2,901	70%	2,901	70%	\$ 6,015,615	70%	4,159	4,159	\$ 8,548,381	\$ 2,055	\$ 2,055
Thermostatic Shower Valve	Each	40,142	56%	29,395	59%	\$ 1,884,986	56%	30,941	44%	20,102	41%	\$ 1,457,366	44%	71,083	49,497	\$ 3,342,352	\$ 47	\$ 68
New - Combined Showerhead/TSV	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Heat Pump Water Heater	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Tub Diverter/Spout	Each	917	34%	688	33%	\$ 102,711	33%	1,787	66%	1,428	67%	\$ 209,583	67%	2,704	2,116	\$ 312,294	\$ 115	\$ 148
Enclosure																		
Air Sealing / Envelope	Home	89,823	68%	89,823	68%	\$ 11,199,024	56%	42,714	32%	42,714	32%	\$ 8,875,349	44%	132,537	132,537	\$ 20,074,373	\$ 151	\$ 151
Attic Insulation	Home	1,722	36%	1,722	36%	\$ 3,067,851	33%	3,125	64%	3,125	64%	\$ 6,294,037	67%	4,847	4,847	\$ 9,361,888	\$ 1,931	\$ 1,931
HVAC																		
Furnace Repair/Replacement	Home	3,086	43%	3,086	43%	\$ 3,817,451	30%	4,088	57%	4,088	57%	\$ 8,714,308	70%	7,174	7,174	\$ 12,531,759	\$ 1,747	\$ 1,747
Room A/C Replacement	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Central A/C Replacement	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Heat Pump Replacement	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Evaporative Coolers	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Duct Testing and Sealing	Home	578	37%	578	37%	\$ 239,886	39%	998	63%	998	63%	\$ 377,024	61%	1,576	1,576	\$ 616,910	\$ 391	\$ 391
Energy Efficient Fan Control A/C Time Delay	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Prescriptive Duct Sealing	Home	5,155	37%	5,060	37%	\$ 526,439	35%	8,781	63%	8,781	63%	\$ 957,824	65%	13,936	13,841	\$ 1,484,263	\$ 107	\$ 107
High Efficiency Forced Air Unit (HE FAU)	Home	15	22%	15	22%	\$ 46,541.15	0%	53	78%	53	78%	\$165,620.55	0%	68	68	\$ 212,162	\$ 3,120	\$ 3,120
New - Blower Motor Retrofit	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Maintenance																		
Furnace Clean and Tune	Home	11,179	52%	11,179	52%	\$ 640,802	51%	10,509	48%	10,509	48%	\$ 612,594	49%	21,688	21,688	\$ 1,253,396	\$ 58	\$ 58
Central A/C Tune-up (N/A)	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Lighting																		
Lighting	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - LED Diffuse A-Lamps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - LED Reflector Bulbs (PAR/BR)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - LED Torchieres	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - LED Exterior Hardwired Fixtures	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - LED Internal Hardwire	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Miscellaneous																		
Pool Pumps	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Smart Power Strips - Tier 1	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Smart Power Strips - Tier 2	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Ancillary Services																		
Commissioning	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Audit	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Administration	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Pilots																		
Smart Thermostat	Home	3,412	33%	3,412	33%	\$ 866,420	33%	6,806	67%	6,806	67%	\$ 1,781,932	67%	10,218	10,218	\$ 2,648,352	\$ 259	\$ 259
Outreach & Assessment																		
Customer Enrollment	Home	107,965	71%	107,965	71%	\$ 18,012,921	65%	44,401	29%	44,401	29%	\$ 9,913,171	35%	152,366	152,366	\$ 27,926,092	\$ 183	\$ 183
In-Home Education	Home	63,490	65%	63,490	65%	\$ 968,855	65%	33,682	35%	33,682	35%	\$ 514,463	35%	97,172	97,172	\$ 1,483,318	\$ 15	\$ 15

¹ The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1.

	A	B	C	D	E
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element ¹ SOUTHERN CALIFORNIA GAS COMPANY				
2	ESA Program:	Labor ¹	Non-Labor ²	Contractor ³	Total
3	Energy Efficiency				
4	Appliances	\$ -	\$ -	\$ 5,884,981	\$ 5,884,981
5	Domestic Hot Water ⁴	\$ -	\$ (1,770)	\$ 18,046,389	\$ 18,044,619
6	Enclosure ⁴	\$ -	\$ (306)	\$ 29,200,922	\$ 29,200,616
7	HVAC ⁴	\$ -	\$ (1,155)	\$ 17,511,914	\$ 17,510,759
8	Maintenance ⁴	\$ -	\$ (2)	\$ 1,251,992	\$ 1,251,990
9	Lighting	\$ -	\$ -	\$ -	\$ -
10	Miscellaneous ⁵	\$ -	\$ -	\$ (1,703,249)	\$ (1,703,249)
11	Customer Enrollment ⁴	\$ 44,179	\$ (133)	\$ 29,094,343	\$ 29,138,390
12	In Home Education	\$ -	\$ 264,271	\$ 1,482,658	\$ 1,746,929
13	Pilot	\$ -	\$ -		\$ -
14	Energy Efficiency TOTAL	\$ 44,179	\$ 260,905	\$ 100,769,950	\$ 101,075,034
15					
16	Training Center	\$ 550,865	\$ 9,115	\$ -	\$ 559,980
17	Inspections	\$ -	\$ -	\$ 1,811,637	\$ 1,811,637
18	Marketing and Outreach	\$ -	\$ 1,195,256	\$ -	\$ 1,195,256
19	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
20	Measurement and Evaluation Studies	\$ -	\$ 25,738	\$ -	\$ 25,738
21	Regulatory Compliance	\$ 396,719	\$ -	\$ -	\$ 396,719
22	General Administration	\$ 4,441,020	\$ 1,813,583	\$ -	\$ 6,254,603
23	CPUC Energy Division	\$ -	\$ 111,040	\$ -	\$ 111,040
24					
25	TOTAL PROGRAM COSTS ⁶	\$ 5,432,783	\$ 3,415,636	\$ 102,581,587	\$ 111,430,005
26					
27	¹ Labor: Utility staff labor including labor indirects (vacation and sick leave, payroll taxes.)				
28	² Non-Labor: All other non-labor costs excluding contractor costs defined below.				
29	³ Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In Home Energy Education services.				
30	⁴ Includes cash discount and other misc. credits in non-labor.				
31	⁵ Repayment credits associated with COVID - 19 contractor advances.				
32	⁶ Total program cost stated here does not include MF-CAM and M&E costs funded out of unspent funds from previous cycle related in the amount of \$1,444,936 and \$35,413 respectively. (See Tbl 1A) Total 2020 ESA program cost including MF CAM and M&E equals \$111,430,005 + \$1,444,936 + \$35,413 = \$112,910,354.				

	A	B	C	D	E	F	G	H
1	PY 2021 Energy Savings Assistance Program Annual Report ¹ ESA Program Table 8 ESA Program Homes Unwilling / Unable to Participate SOUTHERN CALIFORNIA GAS COMPANY							
2	Reason Provided							
3	County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
4	Fresno	3232	0	0	2	0	0	1
5	Imperial	330	1	0	3	9	1	5
6	Kern	23689	9	0	12	16	3	7
7	Kings	8189	5	0	37	8	0	54
8	Los Angeles	493,773	126	3	68	612	1,237	316
9	Orange	94,249	16	0	17	175	24	29
10	Riverside	83,495	78	0	58	496	169	40
11	San Bernardino	58,256	66	0	83	214	154	36
12	San Luis Obispo	26,433	1	0	2	10	0	2
13	Santa Barbara	28,179	0	0	72	271	1	110
14	Tulare	16,434	32	0	65	39	36	38
15	Ventura	48,791	24	0	1	47	122	0
16	Total	885,050	358	3	420	1,897	1,747	638
17								
18	¹ Summary data for SCG ESA Program and does not include CSD Leveraging and MF Common Area efforts.							
19								
20								
21	ESA Coordinated Treatment (SCE and SoCalGas only)							
22		Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency ¹						
23	# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible		
24	18,201	5,468	1,717	13	89	10,914		
25								
26								
27	¹ Summary data for SCG ESA Program and does not include CSD Leveraging and MF Common Area efforts.							

	A	B	C	D	E	F	G
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 9 Life Cycle Bill Savings by Measure ^{1, 3} SOUTHERN CALIFORNIA GAS COMPANY						
2	Measure Description		2021 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2021 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Home	7,369		146,647	11	\$ 1,376,445
5	Microwaves ²	Home	-		-		
6	Refrigerators	Each	-		-		
7	Freezers	Each	-		-		
8	Domestic Hot Water						
9	Other Hot Water	Home	131,420		415,156	10	\$ 3,542,443
10	Tank and Pipe Insulation	Home	1,746		11,087	9	\$ 85,144
11	Water Heater Repair/Replacement	Home	4,159		9,940	11	\$ 93,298
12	Thermostatic Shower Valve	Each	71,083		115,865	10	\$ 988,655
13	New - Combined Showerhead/TSV	Each	-		-		
14	New - Heat Pump Water Heater	Each	-		-		
15	Tub Diverter/Spout	Each	2,704		15,196	10	\$ 129,669
16	New - MF CAM Central Water Heater	Each	40		76,540	20	\$ 1,306,201
17	Enclosure						
18	Air Sealing / Envelope	Home	132,537		61,954	11	\$ 581,509
19	Attic Insulation	Home	4,847		148,101	20	\$ 2,527,425
20	HVAC						
21	Furnace Repair/Replacement	Home	7,174		(248,433)	20	\$ (4,239,654)
22	Room A/C Replacement	Home	-		-		
23	Central A/C Replacement	Home	-		-		
24	Heat Pump Replacement	Home	-		-		
25	Evaporative Coolers	Home	-		-		
26	Duct Testing and Sealing	Home	1,576		17,509	3	\$ 44,821
27	Energy Efficient Fan Control A/C Time Delay	Home	-		-		
28	Prescriptive Duct Sealing	Home	13,936		154,829	3	\$ 396,337
29	High Efficiency Forced Air Unit (HE FAU)	Home	68		1,103	20	\$ 18,827
30	New - Blower Motor Retrofit	Home	-		-		
31	Maintenance						
32	Furnace Clean and Tune	Home	21,688		(26,676)	3	\$ (68,287)
33	Central A/C Tune-up	Home	-		-		
34	Lighting						
35	Lighting	Home	-				
36							
37	New - LED Diffuse A-Lamps	Each	-				
38	New - LED Reflector Bulbs (PAR/BR)	Each	-				
39	New - LED Torchieres	Each	-				
40	New - LED Exterior Hardwired Fixtures	Each	-				
41	New - LED Internal Hardwire	Each	-				
42	Miscellaneous						
43	Pool Pumps	Home	-				
44	Smart Power Strips - Tier 1	Home	-				
45	New - Smart Power Strips - Tier 2	Each	-				
46	Ancillary Services						
47	Commissioning	Home					
48	Audit	Home	-				
49	Administration	Home	-				
50	Pilots						
51	Smart Thermostat	Home	10,218		21,865	9	\$ 169,779
52							
53	Total		410,565		920,685		\$ 6,952,610
54							
55	Total Homes Served By the Program	131,745					
56	Life Cycle Bill Savings Per Home						\$ 52.77
57							
58	¹ Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.						
59	² For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
60	³ Ordering Paragraph 34 of D. 14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
61							
62	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.						

	A	B	C
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 10 Energy Rate Used for Bill Savings Calculations ¹ SOUTHERN CALIFORNIA GAS COMPANY		
2	Year	\$/kWh	\$/Therm²
3	2021	N/A	0.85
4	2022	N/A	0.88
5	2023	N/A	0.91
6	2024	N/A	0.93
7	2025	N/A	0.96
8	2026	N/A	0.99
9	2027	N/A	1.02
10	2028	N/A	1.05
11	2029	N/A	1.08
12	2030	N/A	1.11
13	2031	N/A	1.15
14	2032	N/A	1.18
15	2033	N/A	1.22
16	2034	N/A	1.25
17	2035	N/A	1.29
18	2036	N/A	1.33
19	2037	N/A	1.37
20	2038	N/A	1.41
21	2039	N/A	1.45
22	2040	N/A	1.50
23	2041	N/A	1.54
24	2042	N/A	1.59
25	2043	N/A	1.63
26	2044	N/A	1.68
27			
28	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.		
29	² Actual 2021 energy rate per therm paid by ESA Program participants. Energy rate beyond 2021 is escalated 3% annually.		

	A	B	C	D	E
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 11 Bill Savings Calculations by Program Year¹ SOUTHERN CALIFORNIA GAS COMPANY				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2013	\$ 97,554,614	\$ 14,434,223	0.15	\$ 135.00
4	2014	\$ 93,781,355	\$ 13,802,052	0.15	\$ 147.00
5	2015	\$ 74,817,588	\$ 9,458,585	0.13	\$ 118.00
6	2016	\$ 58,777,190	\$ 10,005,458	0.17	\$ 143.32
7	2017	\$ 79,364,204	\$ 10,752,700	0.14	\$ 114.65
8	2018	\$ 93,149,896	\$ 10,559,891	0.11	\$ 106.18
9	2019 ¹	\$ 111,539,060	\$ 5,544,743	0.05	\$ 45.43
10	2020	\$ 96,838,449	\$ 5,169,470	0.05	\$ 40.99
11	2021	\$ 111,430,005	\$ 6,952,610	0.06	\$ 52.77
12					
13	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				
14	¹ Savings are based on the results of the 2015-2017 Impact Evaluation completed in 2019, starting from PY2019.				

**PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 12
Fund Shifting ¹
SOUTHERN CALIFORNIA GAS COMPANY**

		Budget ¹			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year			Carry Forward from 2020			Carry Back from 2022									
Date	Program Year 2021	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization	
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total							Electric
	ESA Program:	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%				G-xxxxx, D-xxx-xx-xxxx	
	Energy Efficiency																									
	Appliance	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Domestic Hot Water	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Enclosure	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	HVAC	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Maintenance	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Lighting	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Miscellaneous	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Customer Enrollment	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	In Home Education	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Pilot	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Fund Shifting Offset	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Energy Efficiency TOTAL	\$ -	\$ 121,525,214	\$ 121,525,214	\$ -	\$ 111,430,005	\$ -	\$ -	\$ 10,095,209	\$ 10,095,209	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Training Center	\$ -	\$ 1,007,987	\$ 1,007,987	\$ -	\$ 559,980	\$ 559,980	\$ -	\$ 448,008	\$ 448,008	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Inspections	\$ -	\$ 1,948,590	\$ 1,948,590	\$ -	\$ 1,811,637	\$ 1,811,637	\$ -	\$ 136,953	\$ 136,953	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Marketing and Outreach	\$ -	\$ 1,590,373	\$ 1,590,373	\$ -	\$ 1,195,256	\$ 1,195,256	\$ -	\$ 395,117	\$ 395,117	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	Statewide ME&O	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	M&E Studies	\$ -	\$ 112,500	\$ 112,500	\$ -	\$ 25,738	\$ 25,738	\$ -	\$ 86,762	\$ 86,762	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	0.00%	2. 3.	2. 3.	2. 3.	2. 3.	
	Regulatory Compliance	\$ -	\$ 578,835	\$ 578,835	\$ -	\$ 396,719	\$ 396,719	\$ -	\$ 182,116	\$ 182,116	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	General Administration	\$ -	\$ 7,262,335	\$ 7,262,335	\$ -	\$ 6,254,603	\$ 6,254,603	\$ -	\$ 1,007,733	\$ 1,007,733	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	CPUC Energy Division ²	\$ -	\$ 107,500	\$ 107,500	\$ -	\$ 111,040	\$ 111,040	\$ -	\$ (3,540)	\$ (3,540)	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	0%	2. 3.	2. 3.	2. 3.	2. 3.	
	TOTAL PROGRAM COSTS	\$ -	\$ 134,133,334	\$ 134,133,334	\$ -	\$ 121,784,977	\$ 121,784,977	\$ -	\$ 12,348,357	\$ 12,348,357	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%					
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ -	\$ 134,133,334	\$ 134,133,334	\$ -	\$ 121,784,977	\$ 121,784,977	\$ -	\$ 12,348,357	\$ 12,348,357	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -						

¹ Reflects the authorized funding in D.21-06-015 and AL 5501-G-A. Additional funds allocated from prior-cycle unspent budgets as ordered in AL 5558 dated December 19, 2018 are not shown on this table but appear on Table 1A.

² Total 2021 CPUC oversight expense over authorized budget due to CPUC billed costs vs 2021 budget, but still within overall 2021-2026 cycle budget.
Note: Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx).

Note: No fund-shifting required in 2021.

	A	B
1	PY 2021 Energy Savings Assistance Program Annual Report ESA Program Table 13 Categorical and Other Enrollment ¹ SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5		
6	Type of Enrollment	Number of Homes Treated
7	Women, Infants, and Children Program (WIC)	974
8	Supplemental Security Income (SSI)	1,005
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,056
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	56
11	Tribal TANF	1
12	Medi-Cal	16,663
13	Medicaid/Medi-Cal for Families	186
14	Healthy Families A&B	0
15	National School Lunch Program (NSLP) - Free Lunch	1,499
16	Low-income Home Energy Assistance Program (LIHEAP)	5
17	Bureau of Indian Affairs General Assistance	0
18	Head Start Income Eligible - (Tribal Only)	0
19	Other	5,799
20	Total	21,445
21		
22	¹ Summary data which includes ESA Program and CSD Leveraging efforts.	
23	Note: Does not include MF common area efforts.	

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 14
Leveraging & Integration ⁶
SOUTHERN CALIFORNIA GAS COMPANY

Coordination Type ¹	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measureable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
Leveraging	Anaheim Public Utilities (APU)	SoCalGas has a signed leveraging contract with APU	Yes	Yes	\$ 520,786	N/A	N/A	772	See note "A".	Yes	N/A
Leveraging	Pasadena Water and Power (PWP)	SoCalGas has a signed leveraging contract with PWP	Yes	Yes	\$ 40,245	N/A	N/A	36	See note "A".	Yes	N/A
Leveraging	Easem Municipal Water District (EWMd)	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 39,195	N/A	N/A	603	See note "A".	Yes	N/A
Leveraging	Liberty Utilities	Liberty Utilities co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 29,331	N/A	N/A	1,381	See note "A".	Yes	N/A
Leveraging	Fontana Water Company	Fontana Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 37,800	N/A	N/A	252	See note "A".	Yes	N/A
Leveraging	Metropolitan Water District	Metropolitan Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 399,925	N/A	N/A	4,705	See note "A".	Yes	N/A
Leveraging	San Gabriel Valley Water Company	San Gabriel Valley Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 12,600	N/A	N/A	84	See note "A".	Yes	N/A
Leveraging	California American Water	California American Water co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 7,344	N/A	N/A	558	See note "A".	Yes	N/A
Leveraging	Elsinore Valley Municipal Water District	Elsinore Valley Municipal Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 22,674	N/A	N/A	907	See note "A".	Yes	N/A
Leveraging	Moulton Niguel Water District	Moulton Niguel Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 1,885	N/A	N/A	58	See note "A".	Yes	N/A
Leveraging	Rancho California Water District	Rancho California Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 3,070	N/A	N/A	176	See note "A".	Yes	N/A
Leveraging	Western Municipal Water District	Western Municipal Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 17,584	N/A	N/A	22	See note "A".	Yes	N/A

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

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

³ Annual Energy savings/benefits for measures installation in 2019 are captured in the overall ESA savings totals. SoCalGas does not track and/or measure electric or water savings for the municipalities or water agencies.

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

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

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

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

"A"	<p>Dollar savings based on invoiced amount for co-funded measures.</p> <p>Enrollments calculated by dividing (dollar savings) by (per measure cost). Result is additional customers that can be treated with High Efficiency Washer (rounded up).</p> <p>Therm savings calculated by multiplying (additional customers that can be treated with High Efficiency Washer) by (per measure therm savings).</p>
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PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 15
Expenditures for Pilots and Studies
SOUTHERN CALIFORNIA GAS COMPANY

	Authorized 2021 Funding ¹			2021 Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Total Pilots	\$0	\$0	\$0	\$0	\$0	\$0	0%	0%	0%
Studies									
Impact Evaluation	\$ -	\$ 93,750	\$ 93,750	\$ -	\$ -	\$ -	0%	0%	0%
Needs Assessment ²	\$ -	\$ -	\$ -	\$ -	\$ 35,413	\$ 35,413	0%	0%	0%
Cost-Effectiveness/NEBs	\$ -		\$ -	\$ -	\$ 1,338	\$ 1,338	0%	9%	0%
Process Evaluation	\$ -	\$ -	\$ -	\$ -	\$ 24,400	\$ 24,400	0%	0%	0%
Categorical Eligibility	\$ -	\$ 18,750	\$ 18,750	\$ -	\$ -	\$ -	0%	0%	0%
Potential Ad Hoc Tasks	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Total Studies	\$ -	\$ 112,500	\$ 112,500	\$ -	\$ 61,151	\$ 61,151	0%	54%	54%

¹ Reflects the authorized funding in D.21-06-015 and AL 5501-G-A. Additional funds allocated from prior-cycle unspent budgets as ordered in AL 5558 dated December 19, 2018 are not shown on this table but appear on Table 1A.

² LINA Study funded out of prior cycle unspent Funds per AL 5558. (See ESA table 1A)

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 16
SOUTHERN CALIFORNIA GAS COMPANY

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

Measures	Units	Households that Only Received Education
In-Home Education	Home	8,690

Households for My Energy/My Account Platform		
Opt-Out	Already Enrolled	Opt-In
42,306	83,566	2,178

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

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

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 17
Contractor Advanced Funding and Repayment
SOUTHERN CALIFORNIA GAS COMPANY

B-C								(B)-(cumulative H + cumulative I)
Total Advanced Amount	Total Advance PPRS Credit Eligible [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices Eligible for PPRS Credit [3]	Total PPRS Credit Earned [4]	PPRS Credits Applied [5] [8]	Non PPRS Payments Applied [6] [8] [9]	Total Advances Outstanding [7] [10]
			40%					
			40%					
			40%					
\$ 3,385,695.00			40%					\$ 3,385,695.00
\$ 9,855,019.62			40%					\$ 13,240,714.62
\$ 201,864.00			40%					\$ 13,442,578.62
\$ 949,446.00			40%					\$ 14,392,024.62
	\$ 5,363,051.67	\$ 9,028,972.95	40%	\$ 4,457,143.11	\$ 1,782,857.24	\$ -	\$ (1,008,114.71)	\$ 13,383,909.91
	\$ 444,798.27	\$ (444,798.27)	40%	\$ 54,175.61	\$ 21,670.24	\$ (11,132.55)	\$ (490,909.45)	\$ 12,881,867.91
	\$ -	\$ -	40%	\$ 7,845,963.70	\$ 3,138,385.48	\$ (101,428.16)	\$ (3,010,088.61)	\$ 9,770,351.14
	\$ 1,000,348.19	\$ (1,000,348.19)	40%	\$ 10,440,868.87	\$ 4,176,347.55	\$ (621,273.54)	\$ (87,499.30)	\$ 9,061,578.30
	\$ -	\$ -	40%	\$ 4,593,628.25	\$ 1,837,451.30	\$ (515,945.92)	\$ (1,287,498.00)	\$ 7,258,134.38
	\$ -	\$ -	40%	\$ 9,793,312.86	\$ 3,917,325.14	\$ (683,368.26)	\$ (183,688.07)	\$ 6,391,078.05
	\$ 51,735.19	\$ (51,735.19)	40%	\$ 2,077,779.97	\$ 831,111.99	\$ (887,310.70)	\$ (7,547.14)	\$ 5,496,220.21
	\$ -	\$ -	40%	\$ 1,324,950.32	\$ 529,980.13	\$ (955,680.89)	\$ (492,280.95)	\$ 4,048,258.37
	\$ -	\$ -	40%	\$ 378,617.39	\$ 151,446.96	\$ (464,581.70)	\$ (7,547.14)	\$ 3,576,129.53
	\$ -	\$ -	40%	\$ 288,390.60	\$ 115,356.24	\$ (429,276.58)	\$ (34,058.31)	\$ 3,112,794.64
	\$ -	\$ -	40%	\$ 277,080.29	\$ 110,832.12	\$ (1,103,208.57)	\$ 325,590.62	\$ 2,335,176.69
	\$ -	\$ -	40%	\$ 125,927.18	\$ 50,370.87	\$ (315,806.70)	\$ (21,256.01)	\$ 1,998,113.98
	\$ -	\$ -	40%	\$ 8,757.90	\$ 3,503.16	\$ (303,087.97)	\$ (35,292.65)	\$ 1,659,733.36
	\$ -	\$ -	40%	\$ 15,782.90	\$ 6,313.16	\$ (135,033.57)	\$ (218,320.38)	\$ 1,306,379.41
	\$ -	\$ -	40%	\$ 48,952.51	\$ 19,581.00	\$ (136,522.43)	\$ (218,320.38)	\$ 951,536.60
	\$ -	\$ -	40%	\$ 24,822.88	\$ 9,929.15	\$ (50,763.44)	\$ (300,173.32)	\$ 600,599.84
	\$ -	\$ -	40%	\$ 6,675.92	\$ 2,670.37	\$ (80,824.16)	\$ (359,775.68)	\$ 160,000.00
\$ 14,392,024.62	\$ 6,859,933.32	\$ 7,532,091.30		\$ 41,762,830.26	\$ 16,705,132.10	\$ (6,795,245.14)	\$ (7,436,779.48)	\$ 160,000.00

IOUs - Do not delete footnotes 1-7 below.

[1] Contractor labor and labor-related costs. Post-Pandemic Return to Service (PPRS) credit **eligible**. Based on number of contractors eligible for PPRS credit as of last calendar day of a given month.

[2] 40% for PPRS credit calculation from Joint Tier 2 Advice Letter 5654-G filed on June 29, 2020.

[3] For work performed during PPRS credit-earning period July 15, 2020 through January 14, 2021, for contractors receiving advances. (Dates will vary by IOU based on start of PPRS credit earnings period.)

[4] Based on total monthly contractor invoices, up to maximum allowable for each contractor. Contractors who are not eligible for PPRS credit as of reporting month have a maximum allowable amount of 0.

[5] Credits may be applied at a later date than earned depending on the contractor repayment schedule. This value should not exceed column I.

[6] Includes repayments processed for which PPRS credits were not applied.

[7] For consistency among IOUs, beginning in February 2021, SoCalGas modified Total Advances Outstanding to display aggregated values.

[8] Includes adjustment of \$359,939.29 made in June 2021 due to reallocation of eligible PPRS funds applied.

[9] Repayment requests of \$1,200.00 each from one contractor that went unfulfilled were removed from "Non PPRS Payments Applied" from November 2020 to May 2021.

[10] The advance of \$160,000.00 that was provided to the contractor referenced in [9] was not collected by December 31st, 2021 due to the company, a sole proprietorship, dissolving upon the owner's sudden passing and the decedent's estate's executor not providing the advanced funds. SoCalGas still seeks to retrieve the advanced funds.

Note: This table created pursuant to section 1.2.3 in Commission Resolution E-5074. This report covers the period from the issuance of advances until the last day of the month reported. Any required corrections/adjustments are reported herein and supersede results reported in prior months.

PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 18
Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
SOUTHERN CALIFORNIA GAS COMPANY

ESA Main (SF, MH, MF in-unit)

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF		84,273	0%		0%								
MH		6,040	0%		0%								
MF In-Unit		41,432	0%		0%								
Rent vs. Own					0%								
Own		61,379	0%		0%								
Rent		70,288	0%		0%								
Vacant		78	0%										
Previous vs. New Participant					0%								
Previous		66,406	0%										
New		65,339	0%										
Seniors*			0%		0%								
Veterans*			0%		0%								
Hard-to-Reach*			0%		0%								
Vulnerable*			0%		0%								
Location													
DAC*			0%		0%								
Rural		12,377	0%		0%								
Tribal*			0%		0%								
PSPS Zone		N/A	0%		0%								
Wildfire Zone*			0%		0%								
Climate Zone					0%								
4		248	0%										
5		1,744	0%										
6		6,400	0%										
8		43,959	0%										
9		28,411	0%										
10		32,147	0%										
13		8,705	0%		0%								
14		3,280	0%		0%								
15		4,011	0%		0%								
16		2,840	0%										
CARB Communities*			0%		0%								
Financial													
CARE*			0%		0%								
Disconnected*			0%		0%								
Arrearages*			0%		0%								
High Usage*			0%		0%								
High Energy Burden*			0%		0%								
SEVI*			0%		0%								
Affordability Ratio*			0%		0%								
Health Condition													
Medical Baseline*			0%		0%								
Respiratory*			0%		0%								
Disabled*		8,841	0%		0%								

* Methodology for collecting data is currently being developed.

Pilot Plus and Pilot Deep

Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF In-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. New Participant			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Vulnerable			0%		0%								
Location													
DAC			0%		0%								
Rural			0%		0%								
Tribal			0%		0%								
PSPS Zone			0%		0%								
Wildfire Zone			0%		0%								
Climate Zone 7 (example)			0%		0%								
Climate Zone 10 (example)			0%		0%								
Climate Zone 14 (example)			0%		0%								
Climate Zone 15 (example)			0%		0%								
CARB Communities			0%		0%								
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled			0%		0%								

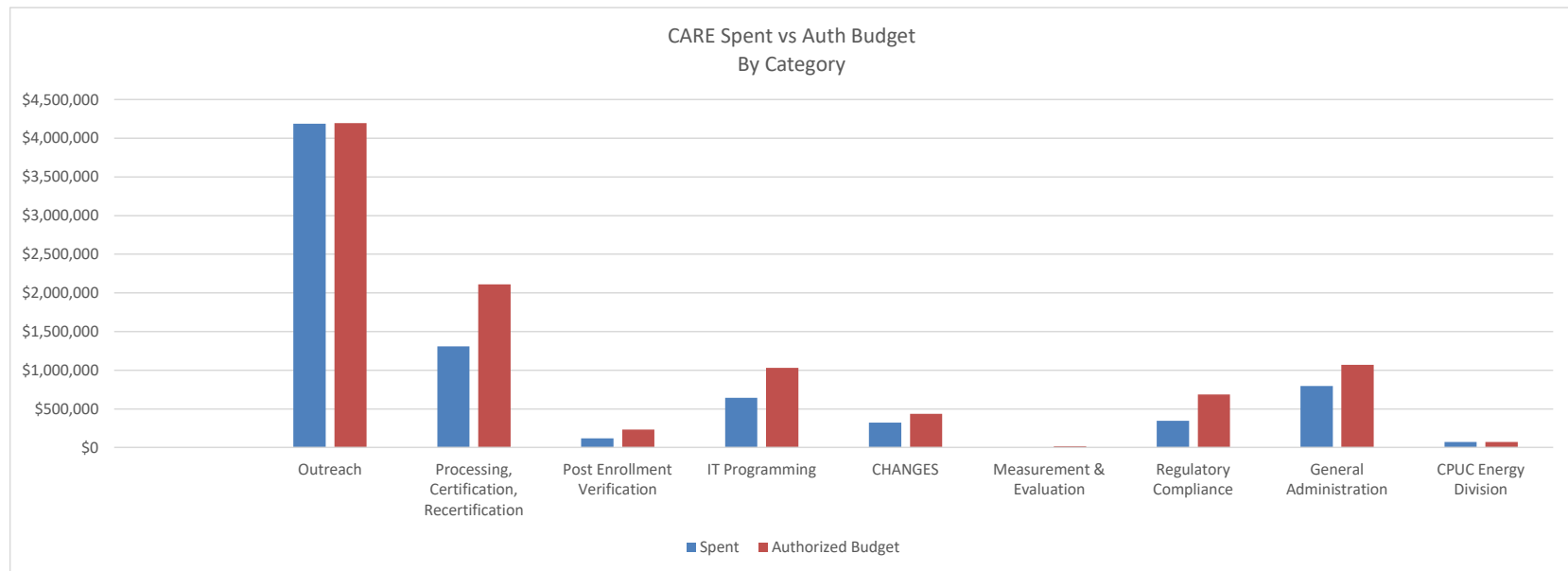
PY 2021 Energy Savings Assistance Program Annual Report
ESA Program Table 19
Tribal Outreach
SOUTHERN CALIFORNIA GAS COMPANY

Outreach Status	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	0	No tribes responded to SoCalGas' outreach efforts
Tribes requested outreach materials or applications	0	No tribes responded to SoCalGas' outreach efforts
Tribes who have not accepted offer to Meet and Confer	0	No tribes responded to SoCalGas' outreach efforts
Non-Federally Recognized Tribes who participated in Meet & Confer	0	No tribes responded to SoCalGas' outreach efforts
Tribes and Housing Authority sites involved in Focused Project/ESA Partnership offer on Tribal Lands	0	No specific Focused Projects or ESA Partnerships in effect.
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	12	Pechanga Band of Luiseno Indians, Morongo Band of Mission Indians, Soboba Band of Luiseno Indians, Torres Martinez Band of Desert Cahuilla Indians, Cahuilla Band of Indians, Tejon Indian Tribe, Agua Caliente Band of Cahuilla Indians, Cabazon Band of Mission Indians, Chemhuevo Indian Tribe, Santa Ynez Band of Chumash Indians, Augustine Band of Cahuilla Indians, Tule River Tribe
Housing Authority and TANF offices who participated in Meet and Confer	0	No tribes responded to SoCalGas' outreach efforts

	A	B	C	D	E	F	G	H
1	PY 2021 CARE Annual Report CARE Table 1 Overall Program Expenses SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5	Category	Overall Expenditures		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted	Shifted to/From/Other Comments?
6		Electric	Gas					
7	Outreach	\$ -	\$ 4,187,822	\$ 4,187,822	\$ 4,197,109	100%		
8	Processing, Certification, Recertification	\$ -	\$ 1,307,691	\$ 1,307,691	\$ 2,111,761	62%		
9	Post Enrollment Verification	\$ -	\$ 119,361	\$ 119,361	\$ 231,637	52%		
10	IT Programming	\$ -	\$ 646,079	\$ 646,079	\$ 1,030,505	63%		
11	CHANGES	\$ -	\$ 322,869	\$ 322,869	\$ 437,502	74%		
12	Measurement & Evaluation	\$ -	\$ -	\$ -	\$ 18,750	0%		
13	Regulatory Compliance	\$ -	\$ 347,264	\$ 347,264	\$ 685,432	51%		
14	General Administration	\$ -	\$ 795,014	\$ 795,014	\$ 1,071,966	74%		
15	CPUC Energy Division	\$ -	\$ 74,026	\$ 74,026	\$ 75,000	99%		
16								
17	TOTAL Program Costs	\$ -	\$ 7,800,126	\$ 7,800,126	\$ 9,859,663	79%		
18								
19	CARE Rate Discount ²	\$ -	\$ 178,416,136	\$ 178,416,136	\$ 134,475,311	133%		
20	Service Establishment Charge Discount	\$ -	\$ 2,613,496	\$ 2,613,496	\$ 3,914,673	67%		
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ -	\$ 188,829,758	\$ 188,829,758	\$ 148,249,647	127%	\$ -	

¹ Reflects Jan-Dec 2021 authorized funding per D. 21-06-015 dated June 3, 2021.

² Total y-t-d subsidies and benefits over annual authorized budget due to COVID impact.



	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	Z	AA	AB
1	PY 2021 CARE Annual Report																											
2	CARE Table 2																											
3	Enrollment, Recertification, Attrition, & Penetration																											
4	SOUTHERN CALIFORNIA GAS COMPANY																											
5		New Enrollment									Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type ⁵			Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (Z/AA)	
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 ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	SF	MF	MH				
7		Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation																			Combined (F+G+H+I)
8	January	2,039	1,482	92	3,613	6,842	2,141	8,022	0	17,005	20,618	238	7,183	0	7,421	0	1	10	10,436	10,447	28,039	10,171	1,056,131	690,081	31,309	1,777,521	1,708,891	104.02%
9	February	1,730	1,796	88	3,614	7,360	2,390	8,092	0	17,842	21,456	351	6,765	0	7,116	0	4	24	11,659	11,687	28,572	9,769	1,062,491	693,155	31,554	1,787,290	1,708,891	104.59%
10	March	2,710	1,989	131	4,830	6,223	2,548	8,778	3	17,551	22,381	345	7,875	0	8,220	0	1	27	12,972	13,000	30,601	9,381	1,069,001	695,950	31,720	1,796,671	1,708,891	105.14%
11	April	4,572	1,704	121	6,397	5,354	3,020	8,125	1	16,500	22,897	209	39,784	0	39,993	0	3	27	11,485	11,515	62,890	11,382	1,076,843	699,368	31,842	1,808,053	1,710,846	105.68%
12	May	12,005	1,640	115	13,760	3,952	2,943	7,573	1	14,469	28,229	141	7,166	0	7,307	0	1	22	11,538	11,561	35,536	16,668	1,090,348	702,438	31,935	1,824,721	1,710,846	106.66%
13	June	2,157	2,262	110	4,529	3,937	2,817	7,669	3	14,424	18,953	129	10,852	0	10,981	0	1	24	14,437	14,462	29,934	4,491	1,094,307	703,231	31,674	1,829,212	1,710,846	106.92%
14	July	5,499	2,210	78	7,787	4,370	3,585	7,539	0	15,497	23,284	964	26,496	91,147	118,607	0	2	120	13,193	13,315	141,891	9,969	1,101,576	705,839	31,766	1,839,181	1,712,462	107.40%
15	August	5,236	2,013	90	7,339	4,068	3,288	8,020	2	15,377	22,716	6,422	52,603	63,543	122,568	0	51	432	13,998	14,481	145,284	8,235	1,107,355	708,278	31,783	1,847,416	1,712,462	107.88%
16	September	6,121	1,738	75	7,934	3,866	3,462	8,050	2	15,380	23,314	8,882	36,548	39,945	85,375	0	116	748	13,350	14,214	108,689	9,100	1,113,483	711,375	31,658	1,856,516	1,712,462	108.41%
17	October	5,601	1,721	53	7,375	4,389	3,020	8,244	5	15,657	23,032	10,892	51,040	48,290	110,222	21,291	89	865	11,757	34,002	133,254	-10,970	1,107,141	708,172	30,233	1,845,546	1,715,832	107.56%
18	November	6,582	1,576	86	8,244	4,058	2,737	7,778	11	14,581	22,825	7,915	26,866	36,651	71,432	28,123	46	771	12,192	41,132	94,257	-18,307	1,096,738	700,265	30,236	1,827,239	1,715,832	106.49%
19	December	3,918	1,437	150	5,505	5,230	2,591	7,476	4	15,305	20,810	9,392	34,194	32,775	76,361	19,736	42	686	11,874	32,338	97,171	-11,528	1,091,127	694,618	29,966	1,815,711	1,715,832	105.82%
20	YTD Total	58,170	21,568	1,189	80,927	59,649	34,542	95,366	32	189,588	270,515	45,880	307,372	312,351	665,603	69,150	357	3,756	148,891	222,154	936,118	48,361	1,091,127	694,618	29,966	1,815,711	1,715,832	105.82%
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	No response includes no response to both Recertification and Verification.																											
26	⁵ Dwelling Type defined as structural configuration only. MF includes 2 or more separate dwellings/units per lot, 2-4 connected dwellings/units per lot, or 5 or more connected dwellings/units per lot. CARE meter configuration must be individually metered or submetered																											

PY 2021 CARE Annual Report

CARE Table 3A

Post-Enrollment Verification Results (Model) 2019

SOUTHERN CALIFORNIA GAS COMPANY

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	1,777,521	24	0.00%	2	0	2	8.33%	0.00%
February	1,787,290	23	0.00%	1	0	1	4.35%	0.00%
March	1,796,671	26	0.00%	1	0	1	3.85%	0.00%
April	1,808,053	18	0.00%	3	0	3	16.67%	0.00%
May	1,824,721	10	0.00%	0	0	0	0.00%	0.00%
June	1,829,212	17	0.00%	4	0	4	23.53%	0.00%
July	1,839,181	12,964	0.70%	10,941	511	11,452	88.34%	0.62%
August	1,847,416	944	0.05%	659	43	702	74.36%	0.04%
September	1,856,516	341	0.02%	228	7	235	68.91%	0.01%
October	1,845,546	1,497	0.08%	970	66	1,036	69.21%	0.06%
November	1,827,239	1,629	0.09%	1,049	96	1,145	70.29%	0.06%
December	1,815,711	2,266	0.12%	1,033	116	1,149	50.71%	0.06%
YTD Total	1,815,711	19,759	1.09%	14,891	839	15,730	79.61%	0.87%

¹ Includes all customers who failed SoCalGas' CARE eligibility probability model.

² Includes customers verified as over income or who requested to be de-enrolled.

³ Verification results are tied to the month initiated and the verification process allows customers 90 days (3 or 4 bill cycles) to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

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

PY 2021

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

¹ Includes all participants who were selected for high usage verification process.

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

³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

	A	B	C	D	E	F	G
1	<p align="center">PY 2021 CARE Annual Report</p> <p align="center">CARE Table 4</p> <p align="center">CARE Self-Certification and Self-Recertification Applications ¹</p> <p align="center">SOUTHERN CALIFORNIA GAS COMPANY</p>						
2							
3							
4							
5		Provided ²	Received	Approved ³	Denied ⁴	Pending/Never Completed ⁵	Duplicates ⁶
6	Total (Y-T-D)	3,200,522	376,860	249,676	58,107	54,796	14,281
7	Percentage		100.00%	66.25%	15.42%	14.54%	3.79%
8							
9	¹ Includes sub-metered customers.						
10	² An estimated number that includes customers whom were provided with CARE self-certification and self-recertification application via direct mail, email, phone, bill insert, door-to-door delivery, utility personnel, and through outreach events.						
11	³ Approved includes customers who are approved through mail-in, via web, by phone, and through duplicated applications.						
12	⁴ Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence.						
13	⁵ Pending/Never Completed includes opt-outs, closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers.						
14	⁶ Duplicates are customers who are already enrolled in CARE and mail in another CARE application. SoCalGas treats them as recertification applications.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2021 CARE Annual Report CARE Table 5 CARE Enrollment by County SOUTHERN CALIFORNIA GAS COMPANY									
2										
3										
4										
5	County	Estimated Eligible			Total Participants			Enrollment Rate		
6		Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	11,823	15	11,838	13,609	21	13,630	115.11%	140.00%	115.14%
8	Imperial	0	15,729	15,729	0	15,968	15,968	N/A	101.52%	101.52%
9	Kern	18,388	35,589	53,977	17,813	34,872	52,685	96.87%	97.99%	97.61%
10	Kings	12	14,819	14,831	14	17,283	17,297	116.67%	116.63%	116.63%
11	Los Angeles	923,227	2,913	926,140	909,939	1,748	911,687	98.56%	60.01%	98.44%
12	Orange	211,880	7	211,887	187,072	26	187,098	88.29%	371.43%	88.30%
13	Riverside	85,221	95,527	180,748	109,064	138,700	247,764	127.98%	145.19%	137.08%
14	San Bernardino	123,486	852	124,338	193,176	825	194,001	156.44%	96.83%	156.03%
15	San Luis Obispo	8,114	13,626	21,739	4,180	13,101	17,281	51.52%	96.15%	79.49%
16	Santa Barbara	31,177	973	32,149	33,949	747	34,696	108.89%	76.77%	107.92%
17	Tulare	12,529	51,544	64,073	13,088	53,851	66,939	104.46%	104.48%	104.47%
18	Ventura	56,304	2,079	58,383	54,769	1,896	56,665	97.27%	91.20%	97.06%
19	Total	1,482,161	233,673	1,715,832	1,536,673	279,038	1,815,711	103.68%	119.41%	105.82%
20										
21	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									

	A	B	C	D	E	F	G	H	I
1	PY 2021 CARE Annual Report CARE Table 7 CARE Capitation Contractors SOUTHERN CALIFORNIA GAS COMPANY								
2									
3									
4									
5	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
6		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
7	Community Action Partnership of Orange County		X	X	X				\$ -
8	Sigma Beta Xi		X						\$ -
9	PACE – Pacific Asian Consortium in Employment		X	X	X				\$ -
10	Community Pantry of Hemet		X						\$ -
11	Community Action Partnership of San Bernardino		X		X				\$ -
12	LA Works		X						\$ -
13	Children’s Hospital of Orange County		X						\$ -
14	LACDA		X						\$ -
15	YMCA Montebello-Commerce		X						\$ -
16	Sr. Citizens Emergency Fund I.V., Inc.		X						\$ -
17	Coachella Valley Housing Coalition		X						\$ -
18	HABBM		X						\$ -
19	Southeast Community Development Corp.		X						\$ -
20	Latino Resource Organization		X						\$ -
21	Community Action Partnership - Kern County		X						\$ -
22	Ventura Cty Comm Human		X						\$ -
23	Blessed Sacrament Church		X						\$ -
24	Hermanidad Mexicana		X						\$ -
25	CSET		X						\$ -
26	Crest Forest Family and Community Service		X						\$ -
27	CUI – Campesinos Unidos, Inc.		X	X	X				\$ -
28	Veterans in Community Service		X	X	X				\$ -
29	MEND		X						\$ -
30	Catholic Charities of LA – Brownson House		X						\$ -
31	OCCC, Inc. (Orange County Community Center)		X						\$ -
32	Green Light Shipping	X							\$ -
33	APAC Service Center		X				32	32	\$ 880
34	Visalia Emergency Aid Council		X						\$ -
35	Total Enrollments and Expenditures						32	32	\$ 880
36									
37	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
38	² Enrollments reflect new enrollments only.								

	A	B	C	D	E	F	G	H	I
1	PY 2021 CARE Annual Report CARE Table 8 CARE Participants as of Month-End SOUTHERN CALIFORNIA GAS COMPANY								
2									
3									
4									
5		Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Enrollment Rate	% Change ^{1, 2}	Total Residential Accounts
6	January	N/A	1,777,521	N/A	1,777,521	1,708,891	104.02%	0.12%	5,660,315
7	February	N/A	1,787,290	N/A	1,787,290	1,708,891	104.59%	0.55%	5,662,936
8	March	N/A	1,796,671	N/A	1,796,671	1,708,891	105.14%	0.52%	5,665,809
9	April	N/A	1,808,053	N/A	1,808,053	1,710,846	105.68%	0.63%	5,667,264
10	May	N/A	1,824,721	N/A	1,824,721	1,710,846	106.66%	0.91%	5,669,671
11	June	N/A	1,829,212	N/A	1,829,212	1,710,846	106.92%	0.25%	5,671,301
12	July	N/A	1,839,181	N/A	1,839,181	1,712,462	107.40%	0.54%	5,672,733
13	August	N/A	1,847,416	N/A	1,847,416	1,712,462	107.88%	0.45%	5,676,101
14	September	N/A	1,856,516	N/A	1,856,516	1,712,462	108.41%	0.49%	5,680,136
15	October	N/A	1,845,546	N/A	1,845,546	1,715,832	107.56%	-0.59%	5,683,778
16	November	N/A	1,827,239	N/A	1,827,239	1,715,832	106.49%	-1.00%	5,686,644
17	December	N/A	1,815,711	N/A	1,815,711	1,715,832	105.82%	-0.63%	5,689,568
18									
19	¹ Explain any monthly variance of 5% or more in the number of participants.								
20	² The SoCalGas population did not vary by a level of 5% or more in any month during 2018.								

	A	B	C	D
1	PY 2021 CARE Annual Report CARE Table 9 CARE Average Monthly Usage & Bill SOUTHERN CALIFORNIA GAS COMPANY			
2				
3				
4				
5	Average Monthly Gas / Electric Usage Residential Non-CARE vs. CARE Customers			
6				
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	19.48	17.65	37.13
10	CARE	15.85	11.27	27.12
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2 and Above	
13	Non-CARE	N/A	N/A	N/A
14	CARE	N/A	N/A	N/A
15				
16				
17	Average Monthly Gas / Electric Bill Residential Non-CARE vs. CARE Customers¹ (Dollars per Customer)			
18				
19				
20	Customer	Gas	Electric	
21	Non-CARE	\$55.34	N/A	
22	CARE	\$40.96	N/A	
23				
24	¹ Excludes master-meter usage.			

¹ Excludes master-meter usage.

	A	B	C	D	E	F
1	<div>PY 2021 CARE Annual Report</div> <div>CARE Table 10</div> <div>CARE Surcharge & Revenue</div> <div>SOUTHERN CALIFORNIA GAS COMPANY</div>					
2						
3						
4						
5						
6						
7						
8	Class	CARE Surcharge	Monthly Bill	Bill	Collected	Revenue Collected
9	Residential	N/A	N/A	N/A	N/A	N/A
10	Commercial	N/A	N/A	N/A	N/A	N/A
11	Agricultural	N/A	N/A	N/A	N/A	N/A
12	Large/Indust	N/A	N/A	N/A	N/A	N/A
13	<div>GAS</div> <div>CARE Surcharge and Revenue Collected by Customer Class</div>					
14						
15						
16						
17						
18	Customer Class	Average Monthly		CARE Surcharge Bill	Total CARE Surcharge Collected	Percentage of CARE Surcharge Revenue Collected
19						
20		CARE Surcharge ¹	Monthly Bill			
21	Residential	\$1.77	\$55.34	3.20%	\$82,277,643	43.00%
22	Commercial	\$20.95	\$375.65	5.58%	\$47,080,810	24.61%
23	Natural Gas Vehicle	\$1,289.08	\$11,457.22	11.25%	\$7,262,698	3.80%
24	Industrial	\$293.11	\$1,493.07	19.63%	\$54,708,359	28.59%
25						
26						

¹ Excludes CARE customers.

¹ Excludes CARE customers.

	A	B	C	D	E	F
1	PY 2021 CARE Annual Report CARE Table 11 CARE Capitation Applications ¹ SOUTHERN CALIFORNIA GAS COMPANY					
2						
3						
4						
5	Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
6	Orange County CDC	0	0	0	0	0
7	Sigma Beta Xi	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Cmty Pantry of Hemet	0	0	0	0	0
10	Cmty Svcs SBDO County	0	0	0	0	0
11	LA Works	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	LA County Development Authority	0	0	0	0	0
14	YMCA Montebello-Commerce	0	0	0	0	0
15	Sr Citizen Emergency Fund	0	0	0	0	0
16	Coachella Valley Housing Coalition	0	0	0	0	0
17	HABBM	0	0	0	0	0
18	SoEast Comm Dev Corp	0	0	0	0	0
19	Latino Resrce Organizatn	0	0	0	0	0
20	Community Action Partnership - Kern County	0	0	0	0	0
21	Ventura Cty Comm Human	0	0	0	0	0
22	Blessed Sacrament Church	0	0	0	0	0
23	Hermanad Mexicana	0	0	0	0	0
24	CSET	0	0	0	0	0
25	Crest Forest Family Cmty	0	0	0	0	0
26	Campeinos Unidos, Inc.	0	0	0	0	0
27	Veterans in Community Service	0	0	0	0	0
28	Meet Ea Need W / Dignity	0	0	0	0	0
29	Cath Char Bronson House	0	0	0	0	0
30	Orange County Comm Ctr (OCCC)	0	0	0	0	0
31	Green Light Shipping	0	0	0	0	0
32	Apac Service Center	32	32	0	0	0
33	Visalia Emergency Aid Council	0	0	0	0	0
34	Total	32	32	0	0	0
35						
36	¹ Includes sub-metered customers.					
37	² Includes new enrollments and recertification applications approved.					

	A	B	C	D	E	F	G
1	PY 2021 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5							
6	Participating Facilities by Month						
7	2021	Gas			Electric		
8		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
9	January	140	1,140	1,280	N/A	N/A	N/A
10	February	140	1,141	1,281	N/A	N/A	N/A
11	March	140	1,141	1,281	N/A	N/A	N/A
12	April	140	1,139	1,279	N/A	N/A	N/A
13	May	140	1,138	1,278	N/A	N/A	N/A
14	June	140	1,135	1,275	N/A	N/A	N/A
15	July	140	1,134	1,274	N/A	N/A	N/A
16	August	140	1,133	1,273	N/A	N/A	N/A
17	September	140	1,132	1,272	N/A	N/A	N/A
18	October	140	1,136	1,276	N/A	N/A	N/A
19	November	140	1,131	1,271	N/A	N/A	N/A
20	December	140	1,134	1,274	N/A	N/A	N/A
21							
22							
23	Average Monthly Gas / Electric Usage ¹						
24	Customer	Gas	Electric				
25		Therms	KWh				
26	Residential Facilities	27.12	N/A				
27	Commercial Facilities	204.94	N/A				
28							
29							
30	CARE Expansion Self-Certification and Self-Recertification Applications						
31		Received	Approved	Denied	Pending/Never Completed	Duplicates	
32	Total	627	619	0	8	2	
33	Percentage		98.72%	0.00%	1.28%	0.32%	
34							
35	¹ Excludes master meter usage.						

PY 2021 CARE Annual Report
CARE Table 13A
CARE Customer Usage and ESA Program Treatment
SOUTHERN CALIFORNIA GAS COMPANY

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

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

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

	A	B
1	PY 2021 CARE Annual Report CARE Table 14 Categorical Enrollment SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5	Type of Enrollment	Number of Customer Enrollments ¹
6	Bureau of Indian Affairs General Assistance	89
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	49,200
8	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	7,972
9	Head Start Income Eligible - (Tribal Only)	287
10	Healthy Families A&B	15,806
11	Low-income Home Energy Assistance Program (LIHEAP)	7,438
12	Medicaid/Medi-Cal	85,289
13	National School Lunch Program (NSLP) - Free Lunch	14,332
14	Supplemental Security Income (SSI)	9,436
15	Tribal TANF ²	7,972
16	Women, Infants, and Children Program (WIC)	18,709
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
18		
19		

SOCALGAS
[PUBLIC VERSION]

APPENDIX A

SECTION 6.3
Tribal Outreach Contacts

Appendix A, Section 6.3, SoCalGas Service Territory Tribal Contact List												
Tribal Name / Organization Name	First Name	Last Name	Title	Street Address	City	State	Zip-Code	Work Phone	Email	URL	Affiliated Counties / Ancestral Areas	Additional Notes for the Area (i.e. is natural gas service received, housing, members, etc.)
Contacts For CARE/Customer Assistance Outreach												
Agua Caliente Band of Cahuilla Indians of the Agua Caliente Indian Reservation, California										Agua Caliente Band of Cahuilla Indians	Riverside	Tribal land receives service. Much of the tribal land is leased to non-tribal residents and businesses.
Augustine Band of Cahuilla Indians, California										www.augustinetribe.org	Riverside	The reservation does not receive service.
Cabazon Band of Mission Indians, California										cabazontribe.com	Riverside	The reservation does not receive service.
Cahuilla Band of Mission Indians of the Cahuilla Reservation, California										http://www.cahuilla.net/	Riverside	The reservation does not receive service.
Chemehuevi Indian Tribe of the Chemehuevi Reservation, California										http://www.chemehuevi.net/	San Bernardino	The reservation does not receive service.
Fort Independence Indian Community of Paiute Indians of the Fort Independence Reservation, California										www.fortindependence.com	Kern	The reservation does not receive service.
Fort Mojave Indian Tribe of Arizona, California and Nevada										www.mojaveindiantribe.com	San Bernardino	
Morongo Band of Cahuilla Mission Indians, California										www.morongonation.org	Riverside	
Pechanga Band of Luiseno Mission Indians of the Pechanga Reservation, California										http://www.pechanga-nsn.gov	Riverside	Tribal land receives service.
Quechan Tribe of the Fort Yuma Indian Reservation, California & Arizona											Riverside	The reservation does not receive service.
Ramona Band of Cahuilla, California										http://www.ramona-nsn.gov	Riverside	
San Manuel Band of Mission Indians, California										http://www.sanmanuel-nsn.gov/	San Bernardino	Tribal land receives service.
Santa Rosa Band of Cahuilla Indians, California										http://www.santarosacahuilla-nsn.gov/	Riverside	The reservation does not receive service.
Santa Rosa Indian Community of the Santa Rosa Rancheria, California										http://www.tachi-yokut-nsn.gov/	Kings	
Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation, California										http://www.santaynezchumash.org	Santa Barbara	Tribal land receives service.
Soboba Band of Luiseno Indians, California										http://www.soboba-nsn.gov	Riverside County	Tribal land receives service.
Table Mountain Rancheria of California											Fresno	
Tejon Indian Tribe										www.tejonranch.com	Kern	The reservation does not receive service.
Torres Martinez Desert Cahuilla Indians, California										http://www.torresmartinez.org	Riverside	The reservation does not receive service.
Tule River Indian Tribe of the Tule River Reservation, California										http://www.tulrivertribe-nsn.gov	Fresno	The reservation does not receive service.
Twenty-Nine Palms Band of Mission Indians of California										http://29palmstribe.com/history.html	Imperial	The reservation does not receive service.

SoCalGas Community Based Organizations Serving Tribal Communities				
American Indian Chamber of Commerce of California		www.aicccal.org	Statewide	N/A
California Nations Indian Gaming Association (CNIGA)		www.cniga.com	Statewide	N/A
California Nations Indian Gaming Association (CNIGA)		www.cniga.com	Statewide	N/A
Inter-Tribal Educational Collaborative (ITEC)				N/A
Native American Finance Officers Association (NAFOA)		www.nafoa.org	National	N/A
Southern California Indian Center (SCIC)			Los Angeles, Riverside and Orange counties	N/A
Tribal Alliance of Sovereign Indian Nations (TASIN)		Tribal Alliance of Sovereign Indian Nations Home (tasin.org)	Riverside, Santa Barbara and San Bernardino Counties	N/A