

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

Application of Pacific Gas and Electric Company
for Approval of 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 2022**

[PUBLIC VERSION]

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Dated: May 1, 2023

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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) 2022. 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.

Respectfully Submitted
on behalf of Southern California Gas Company,

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Dated: May 1, 2023



Energy Savings Assistance Program

and

California Alternate Rates for Energy Program

Annual Report

[Public Version]

2022 Results

May 1, 2023

ESA PROGRAM AND CARE ANNUAL REPORT

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ENERGY SAVINGS ASSISTANCE (ESA) PROGRAM ANNUAL REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

The Southern California Gas Company's (SoCalGas's) Energy Savings Assistance (ESA) Program offers energy-saving home improvements, 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) 2022.

PY2022 marked the first full year of the ESA Program under the directives of Decision (D.)21-06-15. The California Public Utilities Commission (CPUC or Commission) approved SoCalGas's 2021-2026 Low Income Application on June 3, 2021 resulting in the new program cycle officially beginning on July 1, 2021. Therefore, during the second half of PY2021, SoCalGas began "ramping down" from the previous program cycle's design of treatment goals towards the execution of new programmatic designs and goals for PY2022.

SoCalGas's "ramp up" efforts in PY2022 were guided by an extensive internal and external coordination process. This process included an evaluation and selection of a new contractor workforce for the "Main" ESA Program¹ through a solicitation process.

¹ The "Main" ESA Program refers to the primary ESA Program which delivers measures to Single Family customers (including mobile homes).

As part of this solicitation, SoCalGas opted for contractors best positioned to deliver the most effective energy savings measures available. Additionally, SoCalGas participated in the selection of a third-party contractor with San Diego Gas and Electric (SDG&E) serving as the lead utility to implement the Southern Multifamily Whole Building (MFWB) program to begin serving multifamily² units for the SoCalGas ESA Program in 2023. SoCalGas participated in the solicitation processes to select both an implementer and evaluator for its Whole Home (Pilot Plus and Deep) program jointly with Southern California Edison (SCE) serving as the lead utility in 2022. The Pilot launched in late 2022 with treatments scheduled to be installed starting in 2023.

The above milestones achieved by SoCalGas were accomplished as the ESA Program customers continued to receive treatments throughout PY2022. In doing so, SoCalGas exceeded its treatment target in PY2022, treating 111% of its targeted number of customers. SoCalGas fell short of reaching its therm savings goal in the first full year of the new program design due to the new program design's infancy. The later beginning of the program cycle was a contributing factor because time is needed to determine which measures and strategies will work best to produce the results that move towards greater energy savings per dwelling (including developing new measure packages, creating opportunities for customers to "self-install" basic measures, and incorporating Performance Based Incentives (PBIs) into contractor agreements). SoCalGas recognizes

² Multifamily include properties with five or more units (i.e., dwellings).

its “ramp up” efforts in PY2022 will serve as the foundation to deliver higher energy savings in future years of the program cycle.

1.1 Energy Savings Assistance Program Overview

In 2022, SoCalGas’s ESA Program initiated the process to shift from a program that provides services to all willing and eligible low-income customers by providing all feasible ESA Program measures, to a program which targets customers for greater energy savings. Measures were identified as feasible³ as well as evaluated for energy savings potential through the outreach, assessment, and installation processes. In PY2022, the ESA Program treated a total of 105,067 homes during the first full year of the 2021-2026 program cycle.

Additionally, SoCalGas continued to provide a comprehensive mix of services in 2022 to eligible ESA Program participants. SoCalGas provided the following measures and services to homes:

- In-home energy education
- High efficiency clothes washers
- Domestic hot water measures including:
 - Faucet aerators, low-flow showerheads, and thermostatic shower valves
 - Water heater tank and pipe insulation
 - Water heater repair/replacement
 - Tub diverters
- Enclosure measures including:
 - Envelope and air sealing measures

³ Measures which meet the Policies & Procedures and Installation Standards manuals qualifications to install in a customer’s home.

- Attic insulation improvements
- Heating measures including:
 - Furnace repair/replacement
 - Duct sealing weatherization
 - Smart thermostats
- Maintenance measure
 - Furnace clean and tune

SoCalGas also provided and/or serviced 69,979 total appliances, including: 5,745 water heaters, 27,394 furnaces and 3,701 High Efficiency (HE) clothes washers. The average per home lifecycle bill savings for the PY2022 ESA Program was \$65.

1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in D.21-06-015:

2022 Main ESA Program Summary⁴			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	\$104,432,051	\$94,002,116	90%
Administrative Costs ⁵	\$11,859,721	\$10,434,252	88%
Homes Treated	94,600	105,067	111%
Therms Saved	1,435,220**	741,410	52%
GHG Emissions Reduced (Tons)***	7,345	4,514	61%

* Authorized funding and homes treated goals per D.21-06-015. Authorized budget does not include unspent funds carried over from prior cycles, per D. 19-06-033.

** Per D.21-06-015, approved therms saved goal of 1,435,220 for PYs 2022-2026 are for the *entire* ESA Program portfolio, including Main ESA Program (SF), Multi-Family (MF) in-unit, MF Common Area Measures (CAM) and Multi-Family Whole Building (MFWB), with the singular exception of the Staff Proposal pilot. However, the actual-to-date therm count in this table does not include therm savings contributions from MF CAM. See next table, “Program Summary for 2022 ESA Program MF CAM” for actual-to-date therm savings.

*** GHG Emissions Reduced calculated using EPA Greenhouse Gas Equivalencies Calculator.

⁴ Includes SF, MH and MF in-unit treatments.

⁵ At page 316 of D.21-06-015 states “We approve a cap on administrative expenses for the ESA Program at either 10 percent of total program costs, or the IOU’s historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. We phase out the use of the historical five-year average spend such that the IOUs must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024.”

In 2022, SoCalGas was able to administer the ESA Program within the cost parameters outlined in D.21-06-015⁶ in the first full year of the 2021-2026 program cycle, spending 90% of its authorized budget. Additionally, SoCalGas successfully managed its administrative budget keeping it below 11% of the authorized budget,⁷ utilizing 10% towards administrative costs.

SoCalGas also tracked its program delivery experiences via a quarterly customer satisfaction survey in 2022. In PY2022, 68% of customers rated the *overall quality of service* they received from the SoCalGas ESA Program as “excellent” or “very good.” The key service quality indicator that ranked the highest for SoCalGas was *quality of sign up* where 81% of customers rated SoCalGas “excellent” or “very good.”⁸

Furthermore, approximately 73% of customers rated the SoCalGas ESA Program enrollment process as “very easy” with approximately 27% of the customers surveyed being enrolled virtually in 2022.

The survey continues to help SoCalGas examine its performance relative to enrollment, installation, and inspection visits. These customized evaluations were

⁶ See D.21-06-015 Attachment 1 Table 10: ESA Program Approved Budgets (SoCalGas).

⁷ SoCalGas used the metric of its historical five-year average spend on administrative costs as a percentage (11%) of total program costs for its administrative budget cap as allowable in D.21-06-015 OP 112.

⁸ Customers provide ratings for each attribute on a scale consisting of “Excellent,” “Very Good,” “Good,” “Fair” and “Poor.”

used to help ESA Program contractors understand customer viewpoints and to develop insight on ways to enhance and improve service delivery.

2022 ESA Program MF CAM Summary			
	Authorized Budget/ Planning Assumptions	Actual	%
Budget*	\$10,660,000	\$2,658,870	25%
Administrative Costs ⁹	N/A	N/A	N/A
Properties Treated**	30-50	30	100%
Therms Saved	N/A***	109,391	N/A
GHG Emissions Reduced (Tons)	N/A	579	N/A

* Authorized budget from unspent, uncommitted funds per AL 5865 filed September 17, 2021

** Properties treated estimate per AL 5865 filed September 17, 2021.

***Therms saved goal is at portfolio level.

SoCalGas completed 30 Multifamily Common Area Measure (MF CAM) projects at year end 2022 and has 15 projects in progress. The projects focus on replacing central system domestic space and water heating equipment (e.g., boilers and water heaters). SoCalGas will complete all existing projects in 2023 with the transition to the Southern MFWB Program beginning on July 1, 2023.

2022 MFWB Program Summary			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	N/A	N/A	N/A
Administrative Costs ¹⁰	N/A	N/A	N/A
Homes Treated	N/A	N/A	N/A
Therms Saved	N/A	N/A	N/A
GHG Emissions Reduced (Tons)	N/A	N/A	N/A

⁹ At page 370 of D.21-06-015 states “Administrative costs shall be capped at 10 percent of total multifamily program costs.” SoCalGas allocates CAM related administrative costs to the general ESA Program budget and only allocates program implementation costs to the ESA CAM budget.

¹⁰ Implementation to occur in July 2023.

Per D.21-06-015, SoCalGas will participate and coordinate its MFWB Program as part of the Southern Region program administered by SDG&E. The program is scheduled to commence on July 1, 2023.

2022 ESA Program Pilot Plus/Pilot Deep Summary			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	\$5,859,491	\$0	0%
Administrative Costs ¹¹	\$651,054	\$27,207	4%
Homes Treated	N/A	0	0%
Therms Saved (Plus = 5-15 Percent	N/A	0	0%
Therms Saved (Deep = 15-50 Percent	N/A	0	0%
GHG Emissions Reduced (Tons)	N/A	0	0%

SoCalGas will participate and coordinate its ESA Program Pilot Plus/Deep, also known as ESA Whole Home, administered by SCE. The program selected both implementation and evaluation vendors as part of its solicitation process and kicked-off in December of 2022. It is scheduled to start enrolling customers in the first quarter of 2023.

1.2 Marketing, Education and Outreach

1.2.1 Provide a summary of the segmentation strategy employed, (i.e. tools and analysis used to segment households, how households are segmented and prioritized for treatment, and how this information is communicated to the contractor/CBO).

SoCalGas continued marketing and communication efforts to increase program awareness and reduce barriers such as trust and lack of program recognition that prevent customers from participating. As SoCalGas

¹¹ Attachment 2 of D.21.06-015 states “General Administration – Funds may be allocated for administration of the pilot, not to exceed 10 percent of the pilot budget.

moves from the goal of homes treated to therms savings, the purpose of these ongoing communications is to help build necessary awareness so that customers are willing to engage with and participate in the program. SoCalGas targeted current California Alternate Rate for Energy (CARE) customers who had not been recently treated by the program in the areas with the 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 existing experience with a SoCalGas program. Both the direct-mail letter and email message included a high-level explanation of the program, along with a list of available measures that are subject to eligibility criteria. The letter also 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 generated from these communications efforts are sent to the ESA Program team and referred to program contractors as appropriate. In 2022, SoCalGas sent approximately 250,972 direct-mail letters, 204,204 emails and 221,075 text messages to the eligible CARE customers. Similar to previous years, the ESA Program email open and click-through rates (CTR) continued to perform above benchmarks, with the average open rate at 47.9% and the

average CTR at 4.1%, demonstrating customer interest and engagement with these targeted communications.

1.2.2 Provide a summary of how customers are targeted/referred to implementation Pilots (Pilot Plus/Pilot Deep and Building Electrification).

SoCalGas identified customers for its Pilot Plus/Deep, also known as the ESA Whole Home pilot. In addition to SCE's identification process, customers were identified using the following criteria:

- Customers enrolled in the SoCalGas CARE program
- Customers in Los Angeles, Riverside, and San Bernardino counties
- Customers identified as having high gas usage
 - Greater than 200% above baseline during the winter usage period
- Customers who are also served by SCE

1.2.3 Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, and other factors) and how these customer segments are targeted

In PY2022, SoCalGas focused on targeting current CARE customers in areas with low program enrollment. 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 concentrated efforts in ZIP codes with low ESA Program enrollment that were also Disadvantaged Communities (DACs), targeting current CARE customers in those areas who had not received ESA Program measures since 2016. SoCalGas also continued its targeted outreach tactics to reach underserved customer segments in its service territory.

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

Given that 2022 was a transition year for SoCalGas's ESA Program, some of the delivery strategies employed in 2022 remained consistent with previous years while other new strategies aimed at achieving deeper energy savings were introduced. These strategies included new and improved techniques and programmatic adjustments in the following areas: Marketing and Outreach (M&O), Enrollment and Assessment (E&A), and Operations.

Marketing and Outreach

Yearly ESA Program Paid Media Campaign

SoCalGas did not launch a paid media effort for the ESA Program in 2022.

Email Optimization

To increase ESA Program participation, SoCalGas continued to send personalized email communications to potentially eligible customers in PY2022.

Additionally, emails continued to be personalized, and were targeted to current CARE customers located in DACs with the lowest program enrollment, who had not recently participated in the program. Like previous years, ESA Program email open and click-thru-rates (CTR) continued to perform above benchmarks, with the average open rate at

47.95% and the average CTR at 4.09%, showing both interest and engagement within these targeted communications.

Texting Potentially Eligible Customers

In PY2022, SoCalGas continued its text message campaign to potentially eligible customers with information on the ESA Program. During PY2022, text messages targeted current CARE customers located in DACs with the lowest program enrollment, who had not recently engaged with the program. This text message was sent to approximately 221,075 customers and focused on how the customer may qualify for home improvements by professional contractors at no cost. It also encouraged them to learn more using the program vanity URL (www.socalgas.com/Improvements).

ESA Program Webpage Alignment

SoCalGas consistently managed the ESA Program webpage throughout PY2022 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.

Monthly ESA Program Social Media Posts

In PY2022, SoCalGas continued monthly social media posts promoting the ESA Program. 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 4,350 customers on Facebook and 5,734 customers on Twitter, with Twitter delivering the highest views and engagements. The average Facebook cost-per-link-click was \$0.79. 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 (CAP). 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 PY2022, SoCalGas promoted the ESA Program via mailed bill communications to all residential CARE customers 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 PY2022, ESA Program bill messages reached approximately 4,731,977 residential customers currently enrolled in the CARE program. SoCalGas

also promoted the ESA Program to customers via printed bill envelope messages, driving all residential customers with paper billing (approximately 4,856,704 customers), regardless of program status, to the ESA Program webpage to learn more. In addition, SoCalGas also generally promoted SoCalGas's customer assistance programs via printed bill envelope messages several times a year, driving all residential customers, regardless of program status, with paper billing (approximately 2,458,759 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 PY2023.

Enrollment and Assessment (E&A)

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.

Telemarketers are not required to have an active Home Improvement Salesperson Registration (HISR) and therefore are not issued a SoCalGas badge. The Canvasser and Telemarketer curriculum was provided to contractors enabling them to facilitate their own training. Upon completion of the training, Canvassers are provided with a SoCalGas issued badge. The continued use of temporary badges for ESA Program representatives waiting for a HISR created efficiencies that allowed ESA

Program representatives to perform more energy savings focused enrollments.

In 2022, SoCalGas moved away from a focus on number of homes treated and first-time home enrollments and directed contractors to focus on homes with the potential for achieving higher therms savings. This approach was facilitated by a continued focus on the installation of measures that provide low cost per therms saved, deemphasizing the installation of measures that produce high costs per therm saved, and a deeper exploration of installing measures that achieve high therm savings even at a moderate cost.

ESA Mobile¹² Agreement PDF – Additional Documents

SoCalGas instituted a process to deliver the Statewide Energy Education Guide (EE Guide) and Energy Education Guide flyers (in conjunction with the Customer Agreement) electronically after an ESA Mobile application is processed. Due to the change, contractors were encouraged to collect or verify the correct email address from every applicant where the application documentation would be delivered. In addition, ESA Mobile was enabled to determine if the Primary Language field collected during the enrollment process matched one of the languages to which the EE Guide had been translated. If the value of the Primary Language field

¹² ESA Mobile is the mobile version of the Home Energy Assistance Tracker (HEAT) software application which SoCalGas ESA Program contractors utilize in the field via handheld devices to implement the ESA Program for SoCalGas.

matched one of these translated languages, the corresponding in-language EE Guide would be sent electronically. If not, the English/Spanish version of the EE Guide would be provided.

Property Owner Authorization (POA) Expiration Extension and Non-POA Measures

The existing POA expiration date on the Master Agreement was extended to two years from the previous timeframe of one year. SoCalGas continued to allow certain non-invasive measures, such as faucet aerators, low-flow showerheads, and thermostatic shower valves to be installed without the use of a POA in renter occupied units during the enrollment phase. Non-invasive measure installation at renter occupied units, without the POA restriction, facilitated the completion of enrollments. This is a significant change from the previous process where an ESA Program representative was required to wait for a signed owner authorization, sometimes resulting in cancellation of the application. Furthermore, ESA Mobile was enhanced to include a checkbox identifying an “installing Non-POA Measures Only” application.

Contractor Legitimacy

In 2022 SoCalGas maintained the use of business cards with the ESA Program logo. SoCalGas also designed ESA Program representative polo shirts, and magnetic vehicle placards labeled “authorized contractor.” Each of these pieces was designed to legitimize program contractor

personnel, which is critical as they approach customers at their home and/or at community events.

Language Barriers

Another strategy SoCalGas continued to utilize in 2022 to address language barriers at all stages of program implementation was the use of a dedicated language translation line for ESA Program contractors to use in the field. Through this translation service, ESA 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.

Additional enhancements to remove language barriers and ensure the delivery of program information and energy education included the continued use of the EE Guide previously translated into six languages and Braille. In addition to having the EE Guide available in these languages, it was made available on the SoCalGas ESA Program webpage and, as mentioned earlier, started being delivered electronically to customers whose primary language matched one of the EE Guide translated languages. Having the EE Guide online also ensured customers requiring larger print could benefit from the information provided to customer participants during program enrollment.

Operations

The supporting efforts to transition the program from one focused on treating numbers of households to one focused on providing deeper energy savings in a timely manner, especially to those in underserved segments, are as follows:

- SoCalGas enhanced its existing technology platform to provide program contractors with tools to identify and perform outreach to customers in the various Targeted Population need states, including, but not limited to DACs, Hard-to-Reach (HTR), Tribal, Unwilling from Prior Cycle (UPC) and High Energy Usage. Contractors were directed to utilize this enhanced data to perform better outreach to customers in need of (and likely eligible for) program services that demonstrate the greatest therm savings potential.
- Contact Lists created by contractors in Home Energy Assistance Tracker (HEAT)¹³ to outreach to potentially eligible customers were updated with new data reflecting whether customers were identified as being in one or more of the following segments: Underserved Population (UP), UPC, and High Energy Savings Opportunity (HESO). Having access to this data prior to contacting customers allowed contractors to better communicate program benefits to potentially eligible customers.
- SoCalGas continued to encourage contractors to install measures at the time of enrollment. Historically, and in general, ESA Program representatives enroll the customer, provide energy education, and perform an assessment of measure feasibility during the first visit to the customer's home. A second visit is then scheduled with an energy-savings improvements installer to begin delivering program 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 previously scheduled second appointment, resulting in an enrollment with no measures installed. Encouraging ESA Program representatives to install measures during the first visit (known as simple measures) allows the home to begin receiving the benefit of energy savings even if the customer ultimately does

¹³ The Home Energy Assistance Tracker (HEAT) is the software application SoCalGas ESA Program contractors utilize to implement the ESA Program for SoCalGas.

not follow through with the second visit. Furthermore, SoCalGas believes that receiving some measures on the first visit will give customers a feeling that the program is “real” and might make them more likely to follow through with subsequent scheduled appointments. The procedure can be limited by the fact that some ESA 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 ESA Program representatives are comfortable with, in instances where they are 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.

1.2.5 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date- list of Tribal contacts, including progress towards meeting goal for relationships with non-federally recognized tribes.

In Q4 2022, SoCalGas began working with a Tribal Consultant to assist in meeting the Decision directives for Tribal outreach by coordinating meetings with Tribal leadership. In 2022, SoCalGas met with both Federally- and Non-Federally recognized Tribes, as well as Tribal community leaders. There are 21 Federally Recognized Tribes within SoCalGas’s service territory, of which ten have residential gas service meters. Despite the majority not having access to natural gas service, SoCalGas’s outreach efforts focused on working with Tribal organizations and members to help build awareness about SoCalGas’s Customer Assistance Programs (ESA Program, CARE, Medical Baseline, etc.) as well as trust amongst the community.

SoCalGas also worked internally with Regional Public Affairs to engage with its Tribal Community Partners and provide materials, information on

programs, and website links. The scope of outreach was extended to conduct meetings and present SoCalGas's Customer Assistance Programs to the Tribal communities served by these partners.

Efforts included:

- Outreach to the Tribal Organizations such as: Association of Sovereign Indian Nations (TASIN), the American Indian Chamber of Commerce of California, Southern California Indian Center and Indigenous Women Rising
- Outreach to specific Tribes included the Gabrielino Band of Mission Indians, Apanish Foundation / Chumash, Fernandeno Tataviam Band of Mission Indians (FTBMI), Juaneno Band of Mission Indians, Torres Martinez Desert Cahuilla Band of Mission Indians and Pechanga Band of Luiseno Indians

In accordance with D.21-06-015, SoCalGas confirms that it has an up-to-date list of Tribal contacts. The Tribal outreach list contains contacts of Tribes and Tribal service organizations that SoCalGas has contacted to provide income-qualified assistance information. Efforts were made to contact Tribal staff instead of Tribal members as a courtesy 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 with a referral/link to the socalgas.com/Assistance webpage, email and cell phone contact information for SoCalGas staff, a brief presentation of SoCalGas's Customer Assistance Programs, and a one-page informational pamphlet 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.

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

There were no new energy management measures added to the SoCalGas ESA Program in 2022.

1.2.7 Managing Energy Use

Throughout the ESA Program enrollment and assessment process, ESA Program enrollment representatives discussed energy use with customers to tailor delivery of energy education to each individual customer. For example, educating the customer on recommended thermostat settings ensures their home remains comfortable, their energy use decreases, and their furnace does not have to work unnecessarily hard. Customers are also provided guidance on various energy industry labels such as Energy Guide and ENERGY STAR which may assist customers in determining the appropriate appliances for their home. These and many other details and tips are offered through verbal discussions and either a physical Energy Education Guide or an online version of the Energy Education Guide.

1.2.8 Services to Reduce Energy Bill

Prior to ESA Program enrollment, customers are informed of the potential energy and bill savings they would benefit from by having their home serviced by an ESA Program contractor. As mentioned above, throughout enrollment, assessment, and energy education, customers are informed of ways to reduce their energy use and energy bills. In addition to discussing the benefits of the ESA Program, customers are also informed of other customer assistance programs including CARE, which provides a 20% discount on their energy bill. Finally, the principal benefit of installing ESA Program measures is to reduce energy consumption and provide bill savings.

1.3 Energy Savings Assistance Program Customer Enrollment

1.3.1 Report the number of customers or households treated, the IOU specific household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

In PY2022, SoCalGas treated 105,067 homes which was 111% of its household treatment target (exceeding the treatment target of 94,600 by 10,467).

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

In 2022, SoCalGas continued to use Categorical Eligibility (CE)¹⁴ and self-certification¹⁵ as tools to streamline customer enrollments to the ESA Program. Both methods of determining eligibility decrease the amount of 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 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.

¹⁴ 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.

¹⁵ 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.

Categorical Eligibility: SoCalGas continues to provide the list of CE programs on its company website and on ESA Program brochures which are printed in multiple languages including: English, Spanish, Chinese, Korean, and Vietnamese. These channels are aimed at bringing customer awareness to the minimal documentation requirements for enrolling in the 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. Providing contractors clear direction as early as possible minimizes questions and the potential delay in a customer enrollment.

Self-certification: SoCalGas offers various methods to income qualify households via self-certification such as PRIZM code, CARE Post Enrollment Verification (PEV), and leveraging other IOUs for enrollment or full documentation. In 2022, SoCalGas contractors continued enrolling renters residing in deed-restricted properties using the self-certification method. The enrollment type “Owner Verified” was utilized to enroll customers using the joint Investor-Owned Utility (IOU) POA and Affidavit allowing building owners to certify their 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 performed an extensive review of program eligibility documentation requirements to simplify the enrollment process. This included reducing the number of documents required for submission and broadening the qualification criteria of certain documents, such as tax documents and WIC and CalFresh electronic device verification, so that those documents more typically held by customers can be used to demonstrate program eligibility. SoCalGas continued to review its assessment requirements in order to remove redundant tasks, such as adequate combustion ventilation air (CVA) verification and HE washer qualification criteria, from ESA Program representatives that ultimately were the installer responsibilities. With the removal of tasks deemed no longer the ESA Program representative's responsibility, the enrollment process was further streamlined, thereby reducing the time to enroll customers into the program.

1.3.3 If the IOU has failed to meet its annual energy savings goal, 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 energy savings goals.

Energy Savings Goal

SoCalGas fell short of its therm savings goal in PY2022, saving 741,410 out of the 1,435,220 set forth in the savings goal.

Contributing Factors

PY2022 was the first full year of the 2021-2026 Program Cycle. It continued to serve as a “ramp-up” towards a program based on energy saving goals rather than homes treated goals (which had previously been a program wide priority for several program cycles).

As part of the continued “ramp-up” efforts, SoCalGas dedicated itself to performing several program enablement tasks including:

- Completing the Main ESA Program solicitation process for the new contractor workforce best suited to focus on energy savings goals moving forward in November of 2022.
- Off-boarding approximately half of SoCalGas’s current ESA Program contractor workforce not returning in PY2023.
- Completing the process of selecting a third-party contractor to implement the MFWB program with other Southern IOUs. This was also completed in November 2022.
- Working jointly with SCE to select an implementer and evaluator for the Pilot Plus/Deep program. This included negotiating program energy savings (i.e., therms) and contract executed in the fourth quarter of 2022.

SoCalGas has demonstrated an ability to increase its production and move towards meeting its goals, given time. SoCalGas increased its homes treated totals for five consecutive years.¹⁶

SoCalGas is currently in the infancy stages of the new program cycle’s objective to maximize energy savings. As such, SoCalGas’s new version

¹⁶ Treatments per year: 2016: 69,811, 2017: 93,170, 2018: 99,457, 2019: 122,037, 2020: 126,126 2021: 131,745 as reported in the Low Income Annual Report of each respective year.

of the ESA Program requires maturation to move towards the significantly higher yearly therms savings goal as set forth in D.21-06-015. SoCalGas is learning how to determine which measures and strategies work best to produce the results that move towards greater energy savings.

SoCalGas believes it is not possible evaluate the success of the program until it fully implements several key components:

- Launching the new technology platform which was fundamental to SoCalGas's Low Income Application in 2019 and critical to program success moving forward.
- Finishing the process of ramping down SoCalGas's MF CAM program and transitioning to a third-party implementer as part of the MFWB directed in D.21-06-15.
- Evaluating the effectiveness of packaging new and existing measures to maximize therm savings.

Additionally, the transition to moving away from homes treated to energy savings goals resulted in less treatments than the previous year (131,745 treatments in 2021). Historically, more treatments generated more total therm savings. This was evident in 2021, when SoCalGas treated 131,745 homes and saved 920,685 therms, which was the highest therms savings in the last four years. With significantly less homes treated in 2022 (105,067), SoCalGas grossed fewer therm savings (632,019). However, SoCalGas believes it is moving toward the program objective of higher energy savings per home treated based on increasing its therm savings per home in 2022 with 7.06 therms saved per home. This was the highest therms savings per home in the last three years.

Programmatic Modifications:

SoCalGas will incorporate programmatic modifications to move towards accomplishing annual energy savings goals in the future. These modifications include:

- Continuing to develop measure packages designed to maximize therm savings.
- Providing the opportunity for customers who are eligible for Basic Services to self-install hot water measures, such as aerators, showerheads, and thermostatic shower valves
- Collecting more information from customers at the beginning of the enrollment process to identify which appliances and energy efficiency measures best align with the current offerings of program measures and services.
- Utilizing advanced meter and data analytics to identify customers' needs and more accurately target program services to deliver deeper therm savings to customers.
- Incorporating Performance Based Incentives (PBIs) into ESA Program contractor agreements as another instrument to stimulate our workforce towards achieving deeper energy savings on a per household basis.
- Implementing the HE Wall Heater measure which was previously sidelined due to a manufacturer's issue since the beginning of the program cycle. The new HE Wall Furnace model¹⁷ is scheduled to roll out in the second quarter of 2023. This HE Wall Furnace has an Annual Fuel Utilization Efficiency (AFUE) rating of 82% (approximately 12% more efficient than most new retail wall furnace models) and is substantially more efficient than the existing older wall furnaces (which are as low as 66% AFUE¹⁸). SoCalGas's ESA Program will be regularly replacing older models often installed decades ago. In SoCalGas's 2019 Low Income Application for program years 2021-2026, this measure was described as, "... improving, rather than significantly setting

¹⁷ The Williams AC2030T Top Vent Wall Heater features and efficiency information can be found at <https://www.williamscomfortprod.com/products/furnaces/ac2030t-ac3040t/>

¹⁸ See Prepared Direct Testimony of Mark Aguirre and Erin Brooks, at 4.

back, the program energy savings goals.”¹⁹ Furthermore, this measure represents a rare opportunity to install Health, Comfort and Safety (HCS) measures with positive energy savings by removing less efficient wall furnaces that would otherwise be put to use. Integrating this measure into our treatment offering is expected to have a significant impact on reaching our future therm savings goals in an unlikely area of SoCalGas’s measure portfolio.

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 increased slightly from 6.71% in PY2021 to 8% in PY2022. As in previous years, SoCalGas continued its focus toward targeting increased enrollments within the disabled community across SoCalGas’s service areas. SoCalGas has a dedicated liaison assigned to work with and expand the company’s reach within the disabled community. This person continued to leverage existing relationships to expand outreach to organizations, 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 disabled communities. Some of SoCalGas’s highlights for disability outreach in PY2022 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.

¹⁹ See Prepared Direct Testimony of Mark Aguirre and Erin Brooks, at 4.

- Organizations that SoCalGas collaborated with to promote 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)

- In 2022, similar to 2021, COVID-19 pandemic restrictions limited participation at in-person events. Many events continued to be virtual for most of the year with in-person events picking up in the second half of the year. Although participation was limited, SoCalGas remained visible at 292 events specifically held for the disability community 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
 - SCRS-IL 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 and identify other community partners that provide services for disability communities.

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 PY2022, 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. The 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 at outreach events.

In 2019, SoCalGas's My Account online bill pay system received the AA²⁰ 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 2023, SoCalGas continues to hold this certification. SoCalGas reports the AA status on the CforAT annual report.

The SoCalGas website team regularly conducts audits and complies with the Web Content Accessibility Guidelines (WCAG). The website allows

²⁰ 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. The same criteria that Federal sites are required to meet.

vision-impaired customers who use screen readers and similar assistive technologies to navigate and read its content. SoCalGas continues to update its website for customer accessibility.

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	2,802	44	2%
Capitation	47	2	4%
CARE Referral	6,867	83	1%
Customer Assistance Representatives Referral	89	1	1%
CPUC 2020 Clear Plan	459	40	9%
Direct Mail	471	53	11%
Energy Efficiency Referral	247	27	11%
ESA Mobile	1,075	151	14%
Gas Bill Insert	286	53	19%
HEAT Canvassing List	2,088	173	8%
InfoLine 211	101	5	5%
Joint Utility Data Sharing	3	1	33%
Joint Utility ESA Program, SCE	2	0	0%
LIHEAP	129	8	6%
Master Agreement	397	16	4%
Media/Leveraging Dept./Event	68	3	4%
Muni	51	3	6%
Neighbor/Friend/Relative Referral	4,035	263	7%
Newspaper/Radio/Television	90	17	19%
Other Utility or Municipality Referral	1,761	224	13%
Outreacher – Canvassing	70,998	5,706	8%
Received Services at Another Location	84	8	10%
REN Referral	5	1	20%
SoCalGas – Gas Assistance Fund/Medical Baseline	3	0	0%
SoCalGas – Internet	357	58	16%
SoCalGas Referral	1,612	296	18%
SoCalGas Email	155	33	21%

Telemarketing – Telephone	3,814	549	14%
Univision – Telethon	22	1	5%
Virtual Enrollment	356	64	18%
WNA Approach	1,257	103	8%
Total	99,731	7,986	8.01%

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 PY2022, many efforts were pursued to enhance and expand outreach to the disability community. SoCalGas continued to partner with several key organizations such as Blindness Support Services, Fiesta Educativa, Disability Community Resource Center, MEND San Fernando, OC Autism Foundation, and Southern California Rehabilitation Services - all trusted organizations that provide special resources for these communities. Due to COVID-19 pandemic protections and restrictions, in-person events continued to be limited in 2022 but increased overall compared to previous COVID years. SoCalGas's partnership included presenting at virtual workshops, virtual training of organization staff and case workers, and distributing program materials both printed and electronic for 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 PY2022 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 located in underpenetrated areas to reach special needs customers. Despite events and interactions being largely virtual during the first part of the year, event numbers did increase in the community as some in-person 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 Low Income Energy Efficiency (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.”²¹ In PY2022, 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.

²¹ D.08-11-031, p. 180.

- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to 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 Program Table 14 – Leveraging & Integration in the attachments.

Additionally, information regarding LIHEAP leveraging efforts in terms of enrollment increases can be found on ESA Program Table 13 – Categorical and Other Enrollment in the attachments.

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 based on 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 listed above. In PY2022 the following agencies participated in leveraging water measures:

- Anaheim Public Utilities²²
- California American Water²³
- Eastern Municipal Water District²⁴
- Elsinore Valley Municipal Water District²⁵
- Fontana Water Company²⁶
- Liberty Utilities²⁷
- Metropolitan Water District²⁸
- Moulton Niguel Water District²⁹
- San Gabriel Valley Water Company³⁰
- Rancho California Water District³¹

²² Anaheim Public Utilities (“APU”) – delivers water to the city of Anaheim’s 345,000 residents and more than 15,000 businesses.

²³ California American Water serves customers throughout California, the partnership with SoCalGas focuses on customers residing in Los Angeles and Ventura Counties.

²⁴ Cities in the Eastern Municipal Water District service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula.

²⁵ Elsinore Valley Municipal Water District serves the cities of Lake Elsinore, Wildomar, Murrieta and Menifee.

²⁶ Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.

²⁷ Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.

²⁸ 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.

²⁹ 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.

³⁰ 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.

³¹ Rancho California Water District is a special water district serving approximately 150,000 people in Temecula, Murrieta, and unincorporated areas of Riverside County.

As a result, co-funding from all water agencies totaled \$1,575,400 in PY2022.

The other category for leveraging opportunities focuses on municipal electric providers. 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 funding. The municipal electric providers that partnered with SoCalGas in PY2022 include:

- Anaheim Public Utilities³²
- Pasadena Water and Power³³
- Riverside Public Utilities³⁴

Municipal Utility	Number of Units Served
Anaheim Public Utilities	664
Pasadena Water and Power	5
Riverside Public Utilities	1,000
Total	1,669

³² Anaheim Public Utilities – delivers electricity to the city of Anaheim’s 345,000 residents and more than 15,000 businesses.

³³ 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

³⁴ Riverside Public Utilities – serves more than 109,616 metered electric customers and over 68,640 metered water customers (serving a population of more than 300,000) in and around the City of Riverside.

In PY2022, SoCalGas also partnered with the Metropolitan Water District (Metropolitan) to install cold water measures such as premium high efficiency toilets (0.8 or 1.0 gallons per flush to replace existing toilets with 1.6 gallons per flush or higher), weather-based irrigation controllers, and smart hose bib controllers that are entirely funded by Metropolitan.

Water Agency	Number of Units Served
Metropolitan Water District	1,539

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 Program Table 14 – Leveraging & Integration.

In PY2022, SoCalGas’s collaborative efforts with Anaheim Public Utilities, Pasadena Water and Power, and Riverside Public Utilities created leveraging opportunities that provided comprehensive energy savings to the joint customers of the 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 number of touchpoints per customer which traditionally cause disruption, 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 continues to look for ways to increase leveraging opportunities between the California Department of Community Services and Development's (CSD) Low Income Home Energy Assistance Program (LIHEAP) and SoCalGas's ESA Program. In 2022, SoCalGas contracted with four LIHEAP agencies to conduct enrollment, assessment, and installation services for the ESA Program. As part of their outreach and enrollment efforts, these four agencies can leverage LIHEAP payment assistance customers as leads for ESA Program treatment. LIHEAP

contractors are able to leverage the LIHEAP income verification process which reduces the valuable time required of contractor personnel to enroll eligible customers into the ESA Program for needed program services. In 2022, LIHEAP contractors enrolled 22,676 customers into the ESA Program, nearly one of every five households enrolled into the program.

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.

SoCalGas has also started installing cold-water measures that are funded entirely by the water agencies, for example its partnership with Metropolitan to install premium high efficiency toilets and weather-based irrigation controllers through the ESA Program.

1.6 Integration Success

Per D.08-11-031, Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts.

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

In 2022, 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 Medical Baseline (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, Energy Efficiency (EE) rebates, energy-saving tips to help customers manage their gas bills, paired with information regarding CSD programs.

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.

During 2022, the SoCalGas CARE Program team and SoCalGas Single Point of Contact (SPOC) collaborated closely in executing a strategic initiative that streamlined the CARE enrollment process for multi-property portfolio ownership groups. Together, SoCalGas was able to streamline the CARE application/enrollment and increase customer participation. Feedback from participating affordable housing portfolio owners has been extremely positive. As a direct result of this initiative, the SPOCs were able to deliver CARE program enrollments for 38 MF affordable living facilities, representing over 3,000 units in 2022 and a combined bottom-line, gas utility savings of over \$150,000.

More positive feedback was provided by People Assisting the Homeless' (PATH) CEO, Jennifer Diets, regarding the SoCalGas MF SPOC team. She describes, "SoCalGas MF SPOC team acted quickly in delivering equipment upgrades and rate discounts that have helped us lower our operating costs and improve our resident experience. Importantly, the money saved on our reduced energy costs will enable us to drive the savings into the supportive services our residents need."

Additionally, the SPOCs continue to enroll and support Project Homekey projects throughout the SoCalGas service territory. Project Homekey seeks to reduce homelessness among high-risk individuals in need of assistance. Homekey Funding partnerships enable the purchase and conversion of existing hotels and motels into long-term housing for the homeless population throughout California. In 2022, SPOCs delivered six Project Homekey sites into the CARE program (286 units), with several other Project Homekey opportunities in the development pipeline.

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 provided ESA Program information to Local Government Partnership Program Managers for virtual distribution and in person distribution to partners.

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 is focused on outreach to MF building owners and managers to gain connections within the non-profit affordable housing marketplace. Additionally, the SPOCs have been receiving a steady stream of customer referrals from organizations that have been previously served.

ESA Program staff continued to work closely with SoCalGas's Energy Efficiency team using the SPOC model to refine communication and coordination strategies. 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.

The SPOC's fundamental role is to provide affordable multifamily property owners with fully integrated, energy savings opportunities. The SPOC also coordinates and integrates other IOU/Municipality and Water provider programs. SoCalGas simplifies the process by removing challenges and barriers for property owners.

Traditionally these property owners tend to participate in ESA Program in-unit and CAM direct install measures, which are no-cost to the owner. To better serve our MF market segment partners, the SPOC also offered support for several additional programs and services such as CARE, On-Bill Financing, Solar Thermal, and Energy Efficiency Multifamily Whole Building. SoCalGas assists affordable housing owners with connections to electric/water saving programs that incorporate measures such as ceiling fans, refrigerators, windows, toilets, and turf removal.

SoCalGas SPOCs continually look 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 SPOC'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 of ensuring 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, including the new Summer Reliability programs from D.21-12-015.

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.

SoCalGas does not have activity to report for 2022. Funding was not available for this program year.

1.6.7 SoCalGas did not have funding for the California Solar Initiative Programs in 2022. Provide the number of referrals to the Single Family Affordable Solar Homes Program Administrator.

This section is not applicable to SoCalGas.

1.6.8 Report annually the number of referrals provided to other PAs for participation and the number of leads they successfully acted on by program type.

The SoCalGas SPOCs continue to provide comprehensive support to MF property owners by offering the best solutions and the appropriate programs that allow for maximum benefits. The SPOCs referred and enrolled 38 MF sites in CARE, of which four were Project Homekey sites. One property owner, PATH, a Los Angeles based non-profit group living facility, profited from the streamlined CARE enrollment process. This new process allowed non-profit organizations greater access to CARE benefits. PATH enrolled six facilities resulting in an estimated \$11,000 annually on the cost of natural gas. These savings allowed PATH to reinvest in greater care and support for its residents.

The SPOCs also referred four projects to the EE MFWB program and continue to coordinate leveraging opportunities with water agencies and municipal electric providers.

Overall, capital improvement projects are on hold for many market-rate/affordable owners. This in turn has delayed deep retrofits due to inflationary pressures and increased costs of projects. In 2023, projects may increase if pricing stabilizes and/or supply chains impacted by the COVID pandemic begin to get back to normal levels.

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 2022, SoCalGas continued to promote the growth of a trained workforce and implemented changes to focus on inclusion. It applied a more direct approach than in previous years to expand the employee pool for contractors and promote contractor expansion. SoCalGas continued to rely on its contractors to pre-screen and hire candidates they believe would be successful in performing ESA Program enrollment services.

Contractors continue 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 online to all contractors, ensuring comfort levels and training expectations were met.

The most fundamental change that SoCalGas has recently introduced in the workforce and education space was the ongoing maintenance of fully online training and testing platforms. For the past three years SoCalGas has utilized a training platform that allowed contractors to continue sending prospective ESA Program representatives to train on SoCalGas's E&A policies and procedures to be prepared to enroll eligible customers into the ESA Program. SoCalGas utilizes an online training platform that is user-friendly for prospective ESA 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 previously taught in-person. By putting the material online, it provides the prospective Program representatives with the flexibility 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 186 candidates in 26 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, convenient, and remote format has allowed for a steady pace of Program representatives onboarding throughout the year.

In PY2022, SoCalGas continued discussions with the IOUs to explore joint online training, specifically joint E&A and In-Home Energy Education. SoCalGas discussed the possibility of leveraging resources to establish a joint platform for the delivery of online training with both SDG&E and SCE. Conversations on this coordinated effort continue.

SoCalGas continually looks for ways to improve the delivery of its training. Previously, 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 containing 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 ESA Program representative candidate that attends E&A training. SoCalGas used this information to determine the number of candidates from 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 PY2022, SoCalGas continued to provide various training courses including initial E&A, In-Home Energy Education, Natural Gas Appliance Testing (NGAT), several refresher invoicing trainings, HEAT system, and ESA Mobile site training as well as the virtual enrollment process. 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 ESA 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 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. In 2022, SoCalGas Field Operations resumed conducting all initial training in weatherization, HVAC, and inspection services via an in-person format. Throughout the year, Field Operations conducted 74 initial and refresher classes with 562 installers being trained.

To improve program delivery, SoCalGas provided 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 with 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 2022, SoCalGas hosted two 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 on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers.

This metric was not a requirement for SoCalGas’s existing contractors; therefore, data was not available for 2022. However, contractors providing ESA Program enrollment, assessment, and measure installation services beginning in 2023 will be required to regularly report this data.

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 that did not require SoCalGas's existing ESA Program contractors to report data on in 2022. However, contractors providing ESA Program enrollment, assessment, and measure installation services beginning in 2023 will be required to regularly report this data.

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

This metric was not a requirement for SoCalGas's existing contractors, therefore, data was not available for 2022. However, contractors providing ESA Program enrollment, assessment, and measure installation services beginning in 2023 will be required to regularly report this data.

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 2022. 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
2022 Low Income Needs Assessment	Evergreen Economics	SCE	Jan 2021	Dec 2022
MF-CAM Process Evaluation	Resource Innovations	PG&E	Aug 2021	Nov 2022
Categorical Eligibility Study	Evergreen Economics	SDG&E	June 2022	May 2023

2022 Low Income Needs Assessment (LINA) Study³⁵

Work for the 2022 LINA commenced in January 2021 with Evergreen

Economics as the selected consultant. In 2022, Evergreen Economics and

IOU teams (comprised of EM&V and program leads) achieved the

following milestones throughout the year:

- Performed Energy Burden Analysis
- Conducted Qualitative Interviews with renters
- Discussed landlord interviews
- Drafted questions to implementation outreach contractors

A draft report was prepared by Evergreen Economics in August and was reviewed by IOU EM&V leads and the Low Income Oversight Board (LIOB) in September and October 2022. It was then distributed to the public in mid-October 2022. A public workshop was held by Evergreen Economics and the IOU teams in late October 2022, and the draft report was published for public review and comment by early November 2022.

³⁵ The LINA Study is mandated to be completed every three years per AB 327 and PUC Sec. 382(d).

Evergreen Economics integrated responses from the public in November, and the final report for the study was available in December 2022. It was uploaded onto the Energy Division's Public Document Area (PDA) and California Measurement Advisory Council (CALMAC) websites in 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 had the following objectives: 1) Assess the relative effectiveness of the IOUs' MF CAM outreach, delivery, and implementation strategies; 2) Identify what data currently exists and may be needed to facilitate more reliable evaluations of program impacts; 3) Inform future program designs targeting the income-qualified multi-family sector.

A thorough research plan was developed to guide the process evaluation, which was presented to stakeholders for review and comments. The comparison and assessment of the IOUs' current MF CAM outreach, delivery, and implementation strategies were informed by:

- Framework of the Initiative as expressed by the MF CAM logic model.
- The IOUs' implementation approaches as captured by each IOU's process flow diagram.
- The experience of participants as summarized in the participant journey maps.

A program logic model was developed for the MF CAM Initiative through program materials review and in-depth interviews (IDIs) with the IOUs, program implementers, SPOCs, and ED staff. Together with the participant surveys and IDIs, they informed the development of process flow diagrams and program participant journey maps.

A web-based survey was used to collect data to assess tenant awareness of the initiative, perceived benefits, and tenant satisfaction. The survey outcome informed recommendations addressing metrics to quantify tenants' benefits, including health and safety-related impacts.

Performance metrics were defined, and an impact evaluation approach was devised based on outcomes of the previous activities.

Three public workshops were held throughout the process evaluation to collect stakeholder feedback and share the draft research plan, interim findings, and draft results, respectively. The final report³⁶ with detailed findings was published in October 2022; a summary of high-level findings is included below. Overall findings and recommendations are currently being incorporated into MFWB evaluation and implementation planning.

- **Delivery and Implementation Strategies:** The IOUs employed different program designs and approaches to implement the MF CAM Initiative. The substantial differences in implementation approaches stem from the allocation of roles and responsibilities – each presents unique challenges and benefits.

³⁶ MF-CAM Process Evaluation - Draft Report. Resource Innovations, September 2022.
<https://pda.energydataweb.com/#!/documents/2709/view>

- **Participant (Property Representative) Experience:** Some potential participants were reluctant to participate due to unclear program eligibility rules, the unknown length of time required for the project, and upfront cost of participation. The opportunity to receive no-cost energy-efficient upgrades and the potential energy and bill savings ultimately persuaded these participants.
- **Tenant Awareness and Benefits:** Nearly 50% of the tenants reported they were aware of the MF CAM Initiative and subsequent upgrades. In general, tenants reported limited benefits from the Initiative. A more rigorous assessment comparing perception before and after the project is recommended to better assess tenant health, comfort, and safety for future programs and initiatives.

Categorical Eligibility Study

The IOUs operate three energy assistance programs for income qualified households. CARE and FERA are reduced rate programs, and the ESA Program is a direct install program for eligible customers.

Categorical programs are means-tested low-income assistance programs³⁷ for which the customer's income is verified by the appropriate state and federal agencies. All low-income programs allow categorical program participants to be eligible for enrollment.

The purpose of the Categorical Eligibility study is to evaluate relevant categorical programs and analyze how the eligibility requirements and process of the categorical programs align with the income guidelines of the ESA Program, CARE and FERA.

³⁷ See Public Assistance Programs via: [California Alternate Rates for Energy CARE | SoCalGas](#).

The statewide Study Working Group finalized the Scope of Work for the study. The Request for Proposal (RFP) was published in February 2022. The IOUs and ED scored all proposals and selected Evergreen Economics as the consultant for this project through a competitive bidding process. SDG&E is the lead utility for this study. The study kicked off in July 2022. Evergreen Economics proposed the work plan to the IOUs on August 31, 2022. The comments on the Categorical Study webinar were addressed in the month of September. Evergreen delivered the first draft to the IOUs in early December. Work is still continuing on the database and program outreach. See below for Program outreach status:

Current Stage	Count of Programs
Classification: Data complete and ready for analysis	11
Ongoing	4
Late outreach stage using alternate paths: 1 federal top-down approach, 1 local advocacy organization for veterans	2
Total Programs	17

Evergreen continued to finish the auto-enrollment assessment in March 2023 which included identification of suitable candidates, exploratory interviews and assessment of automatic enrollment/sharing findings. The reporting, communication, and drafting of the final report is scheduled to take place from March through April 2023.

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 “2022 Low Income Needs Assessment (LINA) Study” see section 1.8.1; (2) see ESA Program Table 15 in the attachments for 2022 study budgets and expenditures; (3) and (4) see final report: Evergreen Inc., 2022 Low Income Needs Assessment (LINA) Study - Final Report via the link below: <https://pda.energydataweb.com/#!/documents/2749/view>

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).

Pilot Plus/Deep (ESA Whole Home)

D.21-06-015 Attachment 2 provided for the IOUs to consider a variety of program designs, including regional implementation, particularly in the shared service territory for SoCalGas and SCE for Pilot Plus/Deep. After reviewing the pilot guiding principles outlined above, SoCalGas and SCE jointly decided to implement the pilot in their shared service territory.

This joint approach will provide customers with comprehensive electric and gas energy efficiency services to 1) maximize energy savings, 2) provide for customer-focused service delivery to minimize customer visits, and 3) leverage each respective utility’s program resources to increase program effectiveness to minimize duplication. SCE and SoCalGas have a long history of successfully working together to deliver

ESA Program services effectively to their shared customers. This pilot will be an expansion of those efforts.

The Joint-Pilot budget for PY 2021-2026 is \$51,977,044 with a goal of treating approximately 2,200 homes. On November 22, 2021, Advice Letter (AL) 4650-E was filed detailing the IOUs' proposed program implementation plan.

In July 2022, Maroma Energy Services (Maroma) was awarded the successful bidder for third-party implementation of the Pilot. Maroma will be responsible for the day-to-day implementation of the Pilot to ensure that the Implementation Plan laid out by both SoCalGas and SCE is executed. Both SoCalGas and SCE will have dedicated program managers available to Maroma to assist their efforts and address any questions that arise. In late September 2022, after contract negotiations and other requirements were successfully completed and agreed to, the contract was officially signed and work with the Joint IOUs commenced.

Also in July 2022, Illume Advising (Illume) was awarded as the successful bidder of the Evaluation aspect of the Pilot. Illume will be performing analytics for the pilot and completing surveys, interviews, etc., to gauge the successfulness of the Pilot. Additionally, Illume, in conjunction with the Joint IOUs will be performing annual reviews of the approximately 15,000 potentially eligible customer population to identify balanced cohorts which best meet the eligibility requirements.

During November 2022, the statewide IOUs met collectively to discuss renaming the Pilot to a more customer friendly name. A consensus was reached, and it was agreed upon that the name “ESA Whole Home” would be utilized for all customer facing instances and that Pilot Plus/Deep would be utilized internally by the IOUs.

In December 2022, Illume provided Maroma with its initial list of eligible customers and on December 20, 2022, Maroma commenced customer contacts. Behind the scenes ramp-up work also commenced with the goal that initial customer enrollments and installations would begin late in the first quarter of 2023.

Upon completion of the Pilot, information from both the Implementation and Evaluation will be forwarded to the CPUC’s Energy Division to be reviewed and compared with SDG&E and Pacific Gas & Electric (PG&E) implementation of the Pilot. This information will be utilized to help inform and determine the future strategy of the ESA Program.

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 2022.

1.10 ESA Working Group (WG) and Sub-Working Groups (SWG)

1.10.1 Please provide a brief background on each WG and SWG.

D.21-06-015³⁸ established the mandate for implementing the ESA Working Group (ESA WG) with a list of required tasks and actions.

In 2022, the IOUs responded to Decision 21-06-015 by organizing the ESA WG functions into three Sub-Working Groups (SWGs) and ESA WG Council. In December 2022, per D.22-12-029, the ESA WG added the CARE/FERA PEV SWG to expand the three SWGs from three to four:

- ESA Program Cost-Effectiveness SWG (CE SWG),
- ESA Program Policy and Procedures (PP) and Installation Standards (IS) Manual SWG (PP&IS SWG),
- Universal Application System SWG (UAS SWG), and
- CARE/FERA Post Enrollment Verification SWG (CARE/FERA PEV SWG).

Overall, the ESA WG Council performs the following functions:

- Oversee ESA WG and SWGs,
- Address cross-cutting program concerns beyond the ESA program,
- Coordinate activity with ESA/CARE Study Group, and
- Manage the Response-to-Recommendation (RTR) process, and
- Manage the Facilitation Team.

While the ESA WG strives to encourage consensus on all topics, when consensus is not possible, the ESA WG will move forward with the

³⁸ D. 21-06-015, p. 413, Section 10.2.2.1.

majority while documenting the disagreements. These disagreements and open items are tracked into a Parking Lot document maintained by the facilitators. In addition, all ESA WG meeting material, notes, and actions are posted to the CPUC public site for public access

(<https://pda.energydataweb.com>).

To improve communication within the ESA WG and SWG, a Basecamp system was implemented for all members to post discussions and coordinate interim work products. In addition, all non-public working session meeting notes, actions, and interim deliverables are posted to the members-only Basecamp. All ESA WG and SWG's draft deliverables are posted to the CPUC public site to collect public feedback. The final deliverables are posted to the CPUC public site to support transparency.

1.10.2 What were the accomplishments of each WG and SWG in PY 2022?

2022 ESA Working Group

In 2022, ESA WG and ESA WG Council established the process and procedures necessary to administer the ESA WG infrastructure, including developing charter statements, governances, and Conflict of Interest disclosure statements. The non-IOU ESA WG members are encouraged to support a minimum of two SWGs to ensure continuity and consistency within ESA WG and SWGs. In addition, the five-member ESA WG Council met monthly to plan and address open issues.

By the end of 2022, ESA WG retained eight non-IOU members. In addition, with the support of the ESA WG co-chairs, the ESA WG completed eight statewide public meetings to engage ESA WG IOUs, non-IOU member organizations, and the public.

While the SWGs support the ESA WG, there are additional tasks within the ESA WG charter to support ESA Program operations and improvements. These activities are incorporated into the ESA WG agenda to encourage public discussions for summer Demand Response (DR) responses, program implementation progress, unspent program budgets, LIOB liaison activities, and other ongoing program improvement concerns.

2023 Cost Effectiveness Sub-Working Group

Per D.21-06-015,³⁹ the Cost Effectiveness (CE) SWG's scope is to provide recommendations on cost-effectiveness test considerations via a progress report no later than the end of Q1 2023, and also provide recommendations on the Non Energy Benefits (NEBs) study and stakeholder process via a progress report no later than December 31, 2022. Selected ESA WG Members and non-members supported the CE SWG to ensure project consistency and continuity. In 2022, the CE SWG initiated

³⁹ D.21-06-015, pp. 491-492, OPs 85 and 86.

two tasks - Task 1: Cost-Effectiveness Test Considerations and Task 2: NEBs Study and Stakeholder Process.

In 2022, the CE SWG completed Task 2 as required. This SWG conducted many bi-weekly meetings with members to discuss relevant concerns to support the successful completion of Task 2.

Policies and Procedures & Installation Standards (PP&IS) SWG

The scope of the PP&IS SWG is to incorporate timely updates to the PP&IS manuals to support program implementation.

In 2022, the PP&IS SWG requested that the ESA WG delegate the technical tasks to this SWG for resolution. Selected ESA WG Members support the PP&IS SWG to ensure ongoing project consistency and continuity. In addition, PG&E engaged RHA as the consultant to update the documentation of the PP&IS manuals and assess the HBM requirements. These PP&IS updates are an iterative process based on program implementation needs over regular intervals.

In 2022, this working group completed the following tasks:

- The Statewide ESA Program 2021-2026 Cycle PP Manual update and the Summary of Statewide ESA Program Policy & Procedures Change documentation.
- The final version of the ESA Program IS Manual (Version 1.1), including HBM requirements and the Summary of Statewide ESA Program Installation Standards Change documentation.
- The Final ESA Main Program Measure Offering Modification Protocol.

Universal Application System (UAS) SWG

D.21-06-015⁴⁰ ordered the IOUs to set up a UAS WG, as part of the overall ESA WG, to complete the assigned tasks that include the UAS' purpose, goals, requirements, and intra- and interagency solutions and alternatives.

The UAS SWG successfully filed the *Universal Application System Sub-Working Group Recommendation Report* on July 1, 2022. By year-end, the UAS SWG delegated its charter back to the ESA WG Council to terminate its charter.

CARE/FERA Post-Enrollment Verification (PEV) SWG

In December 2022, D.22-12-029⁴¹ ordered the IOUs to form a SWG under the ESA WG, within 60 days of the issuance of the decision, to focus on improving the income verification procedures and policies, with the ED having the ability to periodically update the scope of the WG's role and resolve potential disagreements among stakeholders. The scope of the CARE/FERA PEV SWG includes developing recommendations that could be implemented in the current program and proposed in the next program application cycle, developing recommendations for additional reporting requirements in either IOU monthly or annual CARE/FERA reports to include data on arrearage and disconnection rates for customers removed

⁴⁰ D.21-06-015, pp. 480-481, OP 45

⁴¹ D.22-12-029, pp. 20-21, OP 2 and OP 3.

from CARE/FERA due to non-response during recertification or PEV compared to other classes of customers, and exploring the CalFresh Confirm Hub tool and other data-sharing partnerships to verify customer income eligibility before requesting recertifications and PEV.

1.10.3 What are some of the goals for each WG and SWG in PY 2023?

2023 ESA Working Group

For 2023, the ESA WG will update its membership roster to include 11 non-IOU members, update co-chairs, and update ESA WG Council members. In addition, an update to the Conflict-of-Interest statements is currently pending. A few non-IOU members are dedicated to the CARE/FERA PEV SWG only, but most non-IOU members will continue to support a minimum of two SWGs to ensure consistency and continuity with ESA WG actions.

In 2023, the ESA WG is scheduled to host eight public meetings, one dedicated to discussing CARE/FERA PEV SWG's recommendations. In addition, the ESA WG public meetings are expected to expand to cover Response-to-Recommendations (RTR) from the published low-income studies to pursue ongoing program operation and improvement efforts.

2023 Cost-Effectiveness Sub-Working Group

In 2023, the IOUs are required to complete Task 1 by March 31, 2023 and will then submit a joint Tier 1 AL informing the Commission of the

necessary steps to begin the NEBs study and how the recommendations from Task 2 of the CE SWG will be incorporated.

Afterward, the CE SWG may delegate its scope and charter back to the ESA WG to wind down the CE SWG in 2023. Later, the ESA WG Council will have the option to reconstitute another CE SWG as needed.

2023 Policies and Procedures P&P and Installation Standards (IS) SWG

Starting in 2023, the PP&IS SWG began working on the following tasks:

- Develop Multifamily Whole Building PP documentation
- Develop standards for new ESA Main Program measures modifications
- Continue to update a series of ESA Program P&P Attachments to maintain consistency between PP and IS manuals
- Address miscellaneous ESA Main and ESA MFWB technical, measure and installation issues
- Participate in the IOU Mid-Cycle Reporting development and filing.

2023 Universal Application System (UAS) SWG

On January 26, 2023, the CPUC issued a ruling requesting additional UAS information and actions. As a result, the UAS project scope was amended to address the implementation of Senate Bill (SB) 1208 and the potential funding needs relating to the implementation of the Concurrent Application Process system (CAS).

2023 CARE/FERA Post-Enrollment Verification (PEV) SWG

In 2023, the IOUs are ordered to form a CARE/FERA PEV SWG and meet specified milestones and deadlines in D.12-22-029, consistent with the ESA WG structure and governance; hold a public meeting in August 2023 to discuss its recommendations and to seek public input, and incorporate its recommendations into the IOUs Mid-Cycle Report.

1.11 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 Administrative Law Judge (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 July 28, 2022 in conjunction with the July ESA Working Group Monthly Meeting. There the IOUs presented an overview of their 2021 CARE and ESA Programs results.

1.12 Multifamily Properties

1.12.1 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. Please include the breakdown of market rate and deed restricted properties treated.

SoCalGas's 2018 Annual Report results informed a subsequent analysis to filter 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 CAM in the ESA Program. However, SoCalGas has not been able to obtain a property data list from a third-party to verify the breakdown of market rate and deed restricted properties within its service territory. SoCalGas was able to compare its 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 2022 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.	2022 Annual Therms ('000)	Therms per Property	2022 Annual Therms ('000)	Energy Use Intensity (Therm/Sq. Ft)	2022 Annual Therms ('000)	Energy Use Intensity (Therm/Sq. Ft)
as Sq. Ft. Data	15,457	19,955	45,389	2936	24,103	0.12	21,282	0.19
Sq. Ft. Data Missing	2,861	N/A	9,981	3,489	3,895	N/A	6,086	N/A
All properties	18,318	--	55,370	3,023	27,998	--	27,372	--

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
2022	415

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.

1.12.2 The IOUs shall describe the activities conducted in multifamily properties for multifamily common area measures under the ESA Program.

SoCalGas's MF CAM Process Flow activities⁴² are as follows:

1. Market Analysis
 - a. Analytics
 - i. Data analysis (Low-Income Parameters)
 1. Master Metered Accounts
 2. PRIZM Codes
 3. Census Tract Data
 4. CARE Participation
 5. CTCAC Properties
 6. CIS - MF Property Data
 - b. Relationship Management with the MF industry via SPOC
 - i. Property Owner Relationships
 - ii. Industry Trade Show and Associations
 - c. Customer direct contact
2. Target Large MF Property Owners and/or Portfolios
 - a. 100 unit+
 - b. Multiple MF Properties in a Portfolio
3. Meet with Key Stakeholders (Property Managers, Facilities Personnel, Decision Makers)
 - a. Explain and Highlight Program Offers
 - i. Verify Deed Restricted, Low-Income qualifications and eligibility requirements.
4. Assess Property for Qualifying Measures
 - a. ESA Program In-Unit
 - b. ESA Program Common Area
 - i. Domestic Water Hot, e.g., Boilers / Water Heaters
 - c. EE Measures
 - d. Other IOU / Municipalities/ 3rd Party Program opportunities
5. Property Owner Agrees to Participate and Meets CAM Eligibility
 - i. Execute Property Owner Authorization and Affidavit
 - ii. Collected Deed-restricted documentation
 - iii. Document Property Information and Measure Overview
6. Assign Contractor

⁴² Timelines vary by project, e.g., size of property (MF high rise, Garden Style, etc.). ESA & EE programs can occur simultaneously but may also begin and end at different intervals.

- a. In-Unit
 - b. CAM
- 7. CAM / SPOC Coordinates with Stakeholders
 - a. Property Owner
 - b. ESA CAM Contractors
 - c. Other IOUs and/ Muni / 3rd Parties
- 8. Install Measures
 - a. Utilizing appropriate ESA, EE or 3rd Party Programs
- 9. Post Installation
 - a. Insulation of equipment
 - b. Factory Startup
 - c. Training
 - d. City Inspection
 - e. Back-in Support
 - i. Benchmarking
 - 1. EPA Portfolio Manager
 - f. Customer Sign-off

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

Introduction / Key Findings and Recommendations

SoCalGas contracted with Recurve Analytics, Inc. to perform the normalized energy use analysis for the reporting purpose in this Annual Report. The report titled, “Metered Performance of the SoCalGas Energy Savings Assistance Multifamily Common Area Measures” by Recurve Analytics, contains results and recommendations from the backcast of SoCalGas’s ESA MF CAM projects. Recurve assessed savings in a backcast via a measurement of changes in Normalized Metered Energy Consumption (NMEC) that customers experienced after participation. The backcast analysis enabled identification of important and actionable aspects of program outcomes, especially as these insights relate to meter-

based performance. Seventeen projects that were completed between January and October of 2021 were analyzed as part of this backcast. Recurve used CalTRACK 2.0 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 MF 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 below gives a summary of results.

Table 1: Backcast results by project

Project	Number of Meters	Number of Qualified Meters	Reporting Year 1 Savings (Therms) ↓	Reporting Year 1 Counterfactual (Therms)	Reporting Year 1 % Savings
Via Dolce	3	2	7624	38462	20%
N. Soto St	1	1	4991	20205	25%
Harmony Ave	1	1	1719	4743	36%
Vanowen St	1	1	1031	5010	21%
Union Drive	1	1	552	9423	6%
Victory Blvd	1	1	547	3696	15%
Calle Amistad	1	1	37	669	6%
Harmony Ave	1	1	-243	4076	-6%
N. Calera	3	3	-372	3769	-10%
Fred Waring Dr.	4	3	-655	5152	-13%
Blythe	1	1	-850	1711	-50%
Clinton Street	2	2	-7071	21867	-32%
Orchid Avenue	1	0	-	-	-
Foothill Blvd.	1	0	-	-	-
Washington Blvd.	2	0	-	-	-
Huntington Drive	1	0	-	-	-
Airport Blvd	1	0	-	-	-
Totals	26	18	7312.5	118788.3	6%

Across the 17 projects, Recurve received data for 26 meters. Recurve was able to make a qualified savings calculation for 12 of the 17 projects (see Section II for details). For the twelve projects combined, Recurve calculated 6% savings.

Table 2: Backcast results by meter

Project ↓	Meter ID	Reporting Year 1 Savings (Therms)	Reporting Year 1 Counterfactual (Therms)	Reporting Year 1 % Savings	Disqualification Reason
Vanowen St	1	1031.6	5010.1	21%	
Calle Amistad	1	37.9	669.8	6%	
Victory Blvd	1	547.7	3696.3	15%	
Blythe	1	-850.7	1711.8	-50%	
Orchid Avenue	1	-3265.4	2491.1	-131%	reporting year 1 pct_savings < -0.5
Foothill Blvd.	1	-	-	-	baseline cvrmse > 1
N. Soto St	1	4991.6	20205.3	25%	
Washington Blvd.	1	-	-	-	baseline_data_sufficiency_not_met
Washington Blvd.	2	-	-	-	baseline_data_sufficiency_not_met
Via Dolce	1	-	-	-	baseline cvrmse > 1
Via Dolce	2	2725.7	11135.6	24%	
Via Dolce	3	4898.5	27326.5	18%	
N. Calera	1	-260.2	579.7	-45%	
N. Calera	2	144.5	1346.8	11%	
N. Calera	3	-256.3	1842.4	-14%	
Clinton Street	1	-3455.0	12067.4	-29%	
Clinton Street	2	-3616.9	9800.1	-37%	
Union Drive	1	552.5	9423.0	6%	
Harmony Ave	1	-243.2	4076.8	-6%	
Harmony Ave	1	1719.8	4743.8	36%	
Huntington Drive	1	-	-	-	baseline_data_sufficiency_not_met
Fred Waring Dr.	1	-1315.3	982.8	-134%	reporting year 1 pct_savings < -0.5
Fred Waring Dr.	2	63.0	916.4	7%	
Fred Waring Dr.	3	-529.5	1918.5	-28%	
Fred Waring Dr.	4	-188.6	2317.9	-8%	
Airport Blvd	1	-	-	-	baseline_data_sufficiency_not_met

Recurve was able to make a qualified calculation for 20 of the 26 meters included in the backcast. Of the nine disqualified meters, four were removed for insufficient baseline data, two were removed for poor model fit, and two were removed as outliers (see Section II for details).

Methods and Data Summary

Recurve utilized the CalTRACK 2.0 Hourly methods and the OpenEEmeter open-source Python code-base to conduct all savings calculations presented in this backcast.⁴³ 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

⁴³ 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.

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.

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

Recurve removed meters with less than 328 days of data in the baseline period 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 removed savings outliers, defined as any meter that experienced savings outside the range of -50 to 50% of predicted consumption.

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.

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>

Figures

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

Figure 1 shows the savings results plotted against predicted usage for all qualified projects in the portfolio. As one would expect, there is a general upward trend in savings as a function of usage.

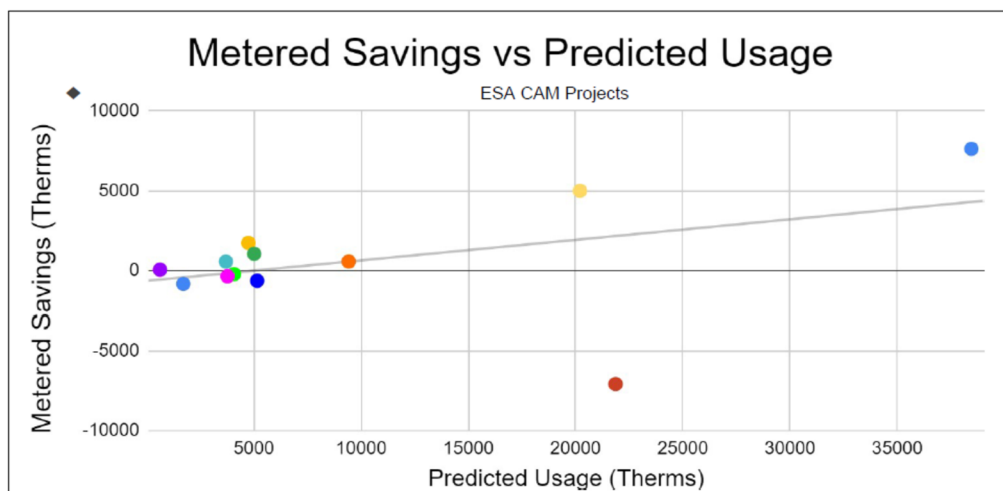


Figure 2: Savings Distributions

Figure 2 shows the distribution of savings for all qualified meters in ESA MF CAM portfolio on both an absolute (Therms) and normalized (%) basis.

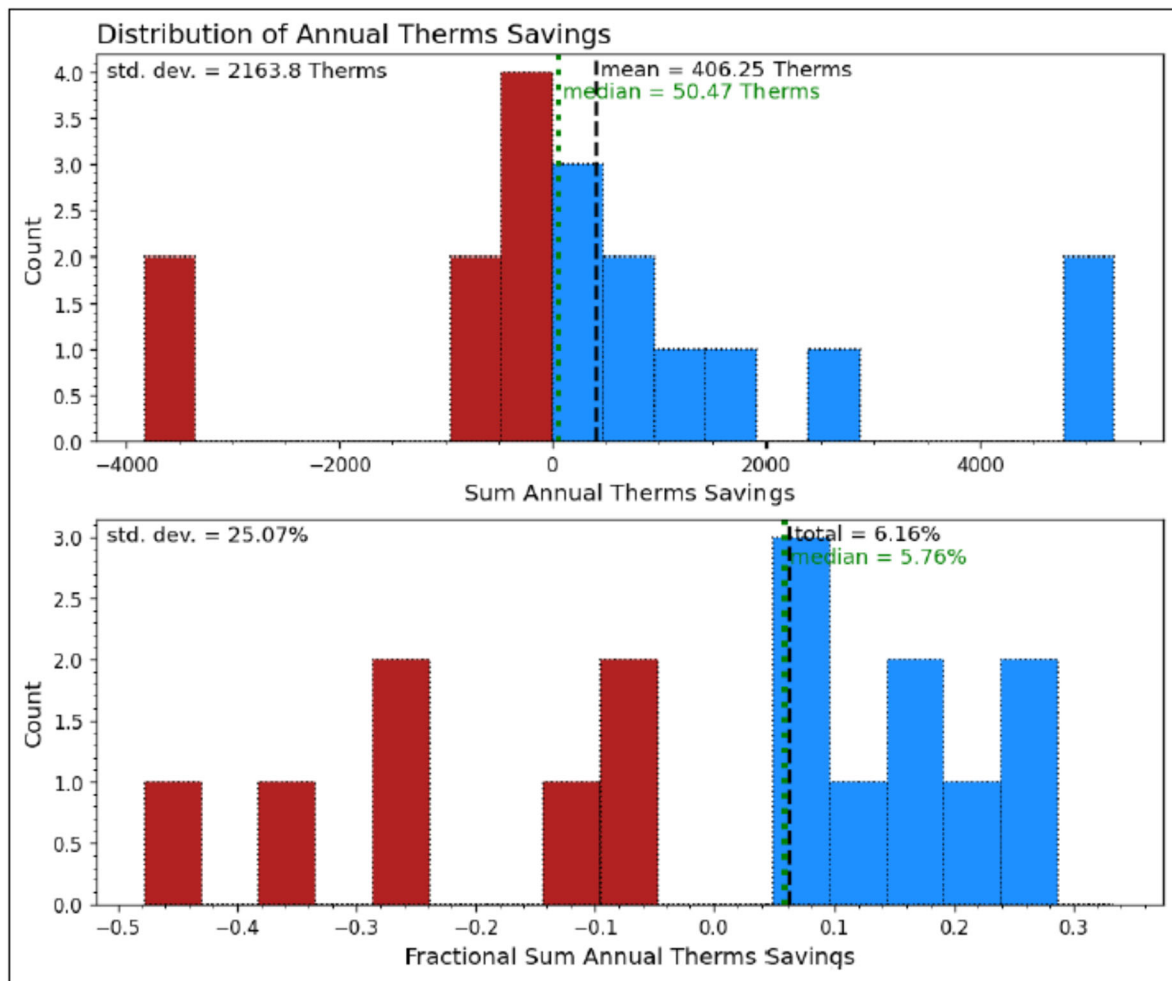


Figure 3: Hour of Day Results by Month

Figure 3 shows the average daily observed and counterfactual gas load shapes (upper) and savings (lower) for each month.

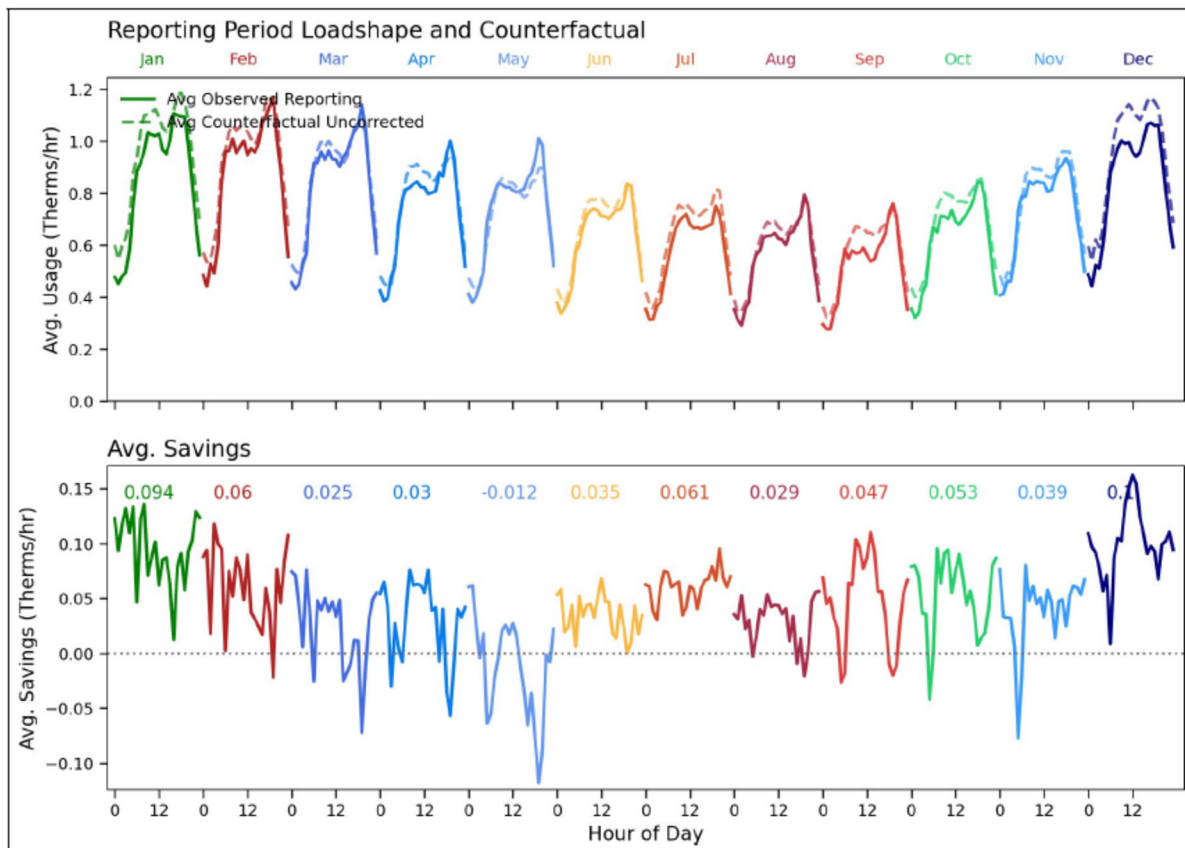
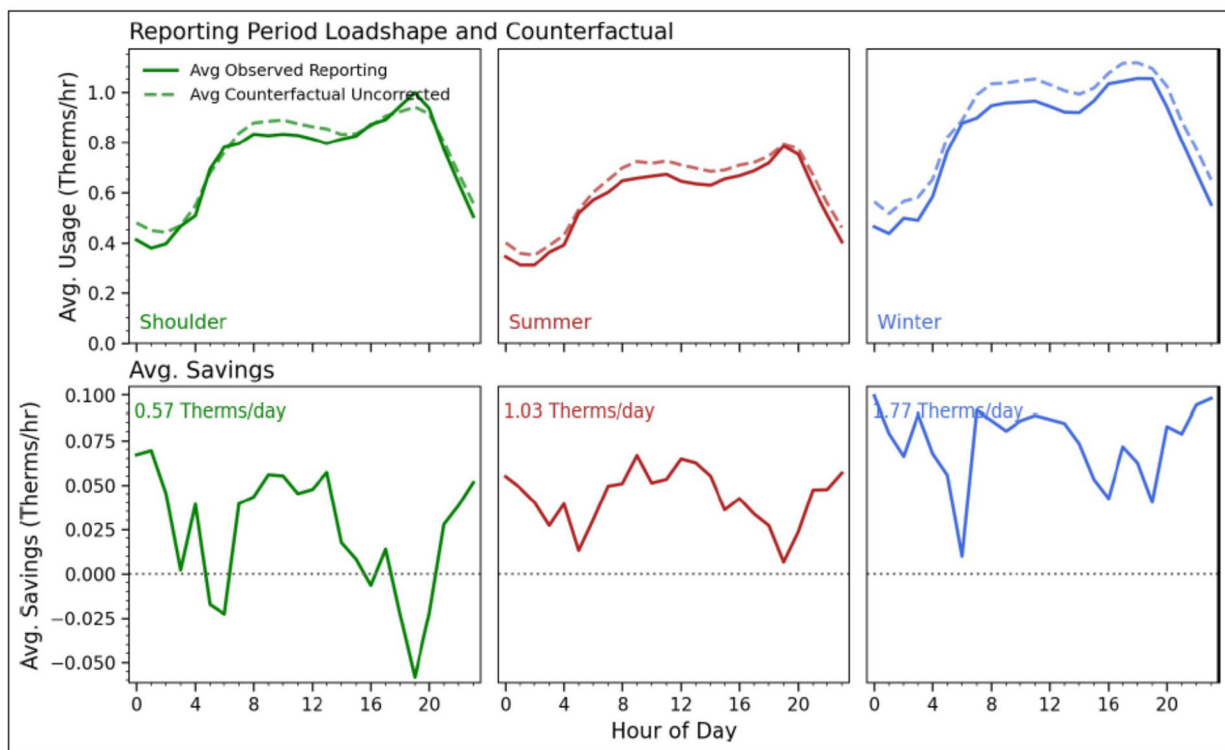


Figure 4: Hour of Day Results by Season

Figure 4 shows the average daily observed and counterfactual gas load shapes (upper) and savings (lower) for each season.



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. The Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in 1992. The program was further expanded to qualified agricultural employee housing facilities in D.95.10-047. In PY2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since PY2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines (FPG).⁴⁴ In PY2010, the legislature enacted 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 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.

⁴⁴ See D.05-10-044, OP 1, at p. 35.

In D.08-11-031, the Commission expanded the list of CE programs to further align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population. Annual funding and participation targets for 2021-2026 was authorized in D.21-06-015.

In 2022, SoCalGas continued its trend of having a successful program year. This report provides information on SoCalGas's CARE Program accomplishments and expenditures for PY2022. At year-end of PY2022, the CARE Program had enrolled 17% more customers than 2021, over 317,175 new customers, exceeding its 95% target with a penetration rate of 110.67%. Other notable achievements and key activities of the CARE Program in 2022 include:

- Continuation of real-time enrollment through CSRs during turn-on and payment extension calls resulting in 105,392 new enrollments, the largest source of new enrollments for 2022;
- Continuation of CARE enrollment, recertification and PEV via SoCalGas's website and My Account allowing customers real-time enrollment and access to their current CARE status, resulting in 121,817 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 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 2022, per the CARE All-Party Meeting Ruling.⁴⁵

⁴⁵ 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.

- 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 37 community- and faith-based organizations and participated in over 2,200 events promoting SoCalGas's Customer Assistance Programs.
- Conducted an internal PEV and Recertification study of the recertification and PEV communication processes and messaging. This assessment involved customer journey mapping activities to identify feasible solutions that can improve customer response rate and program retention.
- Put into production PEV process enhancements to allow completion of PEV and document uploading on the web and mobile for residential non-My Account users and submetered tenants in English, Spanish, Chinese, Korean and Vietnamese. Since then, all residential CARE customers can now use the web or mobile device to complete the enrollment, recertification, and verification requests online.

2.1 Participant Information

2.1.1 Provide the total number of residential CARE customers, including submetered 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 Customer by Month		
Month/Year	Customers	% Change
January 2022	1,813,709	-0.11%
Febraury 2022	1,813,736	0.00%
March 2022	1,811,917	-0.10%
April 2022	1,807,790	-0.23%
May 2022	1,800,656	-0.39%
June 2022	1,790,408	-0.57%
July 2022	1,782,811	-0.42%
August 2022	1,777,876	-0.28%
September 2022	1,776,000	-0.11%
October 2022	1,776,312	0.02%
November 2022	1,774,861	-0.08%
Decmeber 2022	1,781,805	0.39%

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 2022. 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 entire state.

Sources for the 2022 eligibility estimates included the January 2022 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 2020 Summary File 3 (SF3) data, Census American Community Survey (ACS) 2017-2021 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 ACS 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.

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 PY2022.

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 2022, based on the available eligibility data, of SoCalGas's 5,730,165 residential CARE-eligible meters, 28.13% or 1,609,992 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 2022, SoCalGas had 1,22,526 sub-metered tenants in 1,485 master-meter facilities. Assuming, by the methodology described above, 45.5% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 55,807 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 2022, SoCalGas had 28,362 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 51% of its CARE-eligible sub-metered tenants were enrolled in the CARE Program as of the end of PY2022.

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 PY2022, 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 Resident Forums, SoCalGas Account Executives (AEs) and mobile home park residents can discuss the full details of each park's participation in the Mobile Home Park Utility Conversion Program (MHPUCP) including access to customer assistance programs.

Throughout the account sign-up stage and following conversion completion, AEs dedicate time to help residents sign up for CARE and MBL. AEs partner with a CARE representative to ensure that both the CARE and MBL discounts are transferred to the resident'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 Budget *	Actual Expenses **	% of Budget Spent
Outreach	\$4,216,431	\$4,082,566	97%
Proc., Certification and Verification	\$2,184,615	\$1,469,826	67%
Post Enrollment Verification	\$241,043	\$139,564	58%
Information Tech./Programming	\$1,063,935	\$809,244	76%
Pilots	\$80,000	\$38,214	48%
CHANGES	\$437,502	\$387,240	89%
Studies	\$62,500	\$8,108	0%
Regulatory Compliance	\$610,337	\$366,790	60%
General Administration	\$1,111,980	\$1,203,509	108%
CPUC ED Staff	\$77,250	\$52,496	68%
Total Expenses	\$10,085,593	\$8,557,557	85%
Subsidies and Benefits ***	\$139,583,568	\$210,489,561	149%
Total Program Costs and Discounts	\$149,669,161	\$219,056,118	146%
* Reflects the authorized funding per D.21-06-015 dated June 3, 2021.			
** Expenses prior to fund shifting. See CARE Table 1 in Attachments.			
*** Subsidies and Benefits exceeded Authorized Budget due to COVID impact.			

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?
1,781,805	1,609,992	110.67%	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 two (2) recertification complaints in 2022.

March: Information was received through the Customer Comment

Tracking (CCT) system. Per the customer, she was unable to get through to the recertification IVR to recertify for CARE. A lead clerk in the

CARE department called the customer and recertified the customer's eligibility over the phone. The customer was pleased.

May: A customer called the CCC to state that she should be able to recertify over the phone. Since the customer was mailed a verification rather than a recertification application, it was not possible to complete the transaction over the phone. This was explained to the customer, and she was provided the department fax and email address as options to submit her documents of CARE eligibility. The CARE lead representative also provided her with the direct program phone line should the customer require further assistance. The customer was pleased with the follow-up.

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 PY2022 was \$9.66⁴⁶ per month.⁴⁷

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

⁴⁶ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2022 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.

⁴⁷ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

group living facilities or agricultural housing) received \$208,134,057 in natural gas rate discounts and \$2,355,195 in Service Establishment Charges (SEC) discounts in PY2022. The PY2022 annual subsidy for all SoCalGas CARE customers was \$210,489,251.

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

This section is not applicable to SoCalGas.

2.3.2 Administrative Cost

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

See section 2.2 or CARE Table 1 in the attachments.

2.3.2.2 Explain what is included in each administrative cost category.

Marketing & Outreach 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,⁴⁸ postage, bill inserts, brochures, flyers, advertising/mass media campaigns, text messaging, direct mailing campaigns, email campaigns, translations, social media, third party

⁴⁸ 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.

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 stipends based on agreed amounts in Memos of Understandings are also included in this category. 37 CBOs were brought on board in 2022 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 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.

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

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates and 50% of the Categorical Eligibility Study.

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.

Pilots: This category includes all labor costs related to the CARE PEV Live Outbound call Pilot.

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

At year-end 2022, the CARE balancing account was under-collected by \$22,039,421.

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 PY2022, SoCalGas continued to use both targeted and grassroots marketing and outreach tactics to extend awareness and participation in the CARE Program. Targeted tactics include multi-media advertising campaigns, direct mail, email, text messages, bill inserts, door-to-door canvassing, and participation in community outreach events. In addition to these targeted tactics, in PY2022, SoCalGas worked with CBOs to help with outreach of the CARE Program and promote awareness 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, with a specific focus on non-English speaking customers.

As an example, in PY2022 SoCalGas partnered with Chinatown Service Center. Chinatown Service Center serves Los Angeles County, and has offices in Los Angeles, Alhambra, San Gabriel, and Monterey Park. Chinatown Service Center focuses on serving the Chinese Immigrant community but also serves other community members that need assistance. They provide various help such as: medical, dental, optometry,

behavioral health, social services, youth services, and financial help.

Chinatown Service Center is assisting the CAP outreach team by distributing program collateral to their clients and community members.

In addition, SoCalGas continued its partnership with Los Angeles County USC Medical Center's Center Auxiliary for Recruitment, Education, also known as LAC + USC CARE. 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 Customer Assistance Programs information via their senior food distributions, CARES Child and Family Program, Obstetrics department and information stands placed throughout the medical center.

Ethnic Media: Ethnic media plays a critical part in communicating with hard-to-reach customers. For example, SoCalGas continues to work with Chavez Radio Group (KMYX, Bakersfield & KUFW, Visalia) to increase awareness of our 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 Chavez Radio

Group, SoCalGas can reach these customers through a trusted community partner and in their language. The radio schedule consists of short, 30-second Spanish language ads that run several times a day.

In 2022, SoCalGas's three CARE campaigns focused on our ethnic customers, (further discussed in the below Multi-Media section) generating approximately 76,761,489 total media impressions to Hispanic, Chinese, Vietnamese, and Korean markets across a channel mix including radio, digital, television, and social media.

CARE Q1, 2022 Campaign – Hispanic Market (January – February 2022)

- Display Banners: 379,440 impressions
- In-Feed Video: 1,060,300 impressions
- Integrated Segments: 3,311,978 impressions
- Streaming/Video-on-Demand: 862,886 impressions

CARE Q3, 2022 Campaign - Hispanic, Chinese, Korean, and Vietnamese In-Language Campaign: (July – September 2022)

- Radio: 5,443,500 impressions
- Display Banners: 6,293,981 impressions
- Search Ads: 2,324 impressions
- Social Display Ads (Facebook): 9,387,129 impressions
- In-Feed Video: 1,403,021 impressions
- Integrated Segments: 822,700 impressions
- Streaming/Video-on-Demand: 1,159,800 impressions
- Out-of-Home (OOH): 4,723,595 impressions
- Print: 867,420 impressions

CARE, Q4, 20221 Campaign – General, Hispanic, Chinese, Korean, and Vietnamese Markets (October – December 2022)

A breakdown of impressions not yet available.

In addition to the radio spots, SoCalGas's relationship with Chavez Radio Group continued in 2022. Chavez Radio Group 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, Chavez Radio Group increased the SoCalGas social media presence. Instead of the in-person activities, Chavez Radio Group 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 completing applications.

Multi-Media: SoCalGas coordinated three CARE paid media campaigns for PY2022. The first campaign was launched in January and ended in February and was a continuation of the Fall 2021 CARE, multi-channel mass media campaign. With the temporary suspension of the recertification and PEV processes ending in July 2021, SoCalGas's

priority was to help eligible 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 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 and Spanish, across channels including digital, television (integrated segments and live mentions), and more. 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 38,991 program webpage visits and an extremely high click-through rate of 4.19%. Overall, the campaign resulted in:

- 11,872,951 total impressions across channels
- 4,433,458 impressions across General market
- 7,439,493 impressions across the Hispanic market
- 38,991 CARE webpage visits with a strong session duration averaging 89 seconds, demonstrating the campaign is reaching the right customers and the overall message resonated
- 15,048 CARE Program applications from 1/18/22-2/22/22
- 4,754 new program enrollments

- 2,579 re-enrollments
- 4,162,762 social media impressions and 644,162 post engagements
- 2,785,029 Spanish ad impressions
- 1,377,733 English ad impressions
- 63% streaming video completion rate (60% being the benchmark)
- 15-second videos outperformed 30-second videos at 71% versus 56%.

SoCalGas launched a second campaign in July that ended in September.

This campaign targeted Hispanic, 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 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:

- 59,823,994 total impressions
 - 22,051,511 impressions across Chinese in-language efforts or 37% of total impressions
 - 15,934,794 impressions across Hispanic in-language efforts or 27% of total impressions
 - 14,604,761 impressions across Korean in-language efforts or 24% of total impressions

- 7,211,976 impressions across Vietnamese in-language efforts or 12% of total impressions
- 77,912 CARE webpage visits during the weeks of the campaign, with 69,215 of those visits being from users identified as being new to the webpage.
- 9,580 program enrollments from 7/25/22 - 9/2/22 a 10% increase in program enrollments from 6/12/22 – 7/17/22
- 9,387,192 social media impressions with 48,144 engagements

While the campaign results show strong interest in the program from these targeted customers, continued educational outreach and promotion of CARE within these communities would be beneficial.

Lastly, SoCalGas launched a Q4 2022 CARE multi-channel mass media campaign that ran throughout the month of December. 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 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:

- 26,459,586 total impressions across the General and Hispanic markets
- 42,093 CARE webpage visits during the campaign
- 9,049 total program enrollments
- 8,322,316 social media impressions for the General market, with 16,938 engagements

- 4,999,853 social media impressions for the Hispanic market, with 12,953 engagements
- A 98% completion rate from streaming video for General market and 88% for Hispanic audience, showing that the message and creative resonated with viewers.

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 3,812 customers on Facebook and 5,922 customers on Twitter, with Twitter delivering the most engagements. The average Facebook cost-per-link-click was \$0.48. 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 PY2022, CARE text messages provided eligible customers a link to the online CARE application and encouraged them to apply. Text messages were sent to new customers and existing

customers not on CARE. Additionally, SoCalGas sent text messages to customers that were asked to recertify their eligibility to remain enrolled in the program. A total of approximately 234,807 texts were sent across targeted customers in 2022. These three groups of customers also received email and direct mailers with CARE Program information. A total of 12,441 CARE enrollments were tied to these text efforts.

Direct Mail: Targeted direct mail campaigns continue 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. SoCalGas continued to contact new and current customers not on CARE through direct mail. SoCalGas also sent direct mail letters to customers who previously participated in the CARE program but failed to recertify, encouraging them to reapply online and reestablish their monthly discount.

During PY2022, 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 may re-enroll) or reflected the average annual savings of a CARE customer (new customers).

In PY2022, SoCalGas continued to conduct annual SB 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 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 PY2022, 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.

SoCalGas also generally promoted SoCalGas's customer assistance programs via printed bill envelope messages several times a year, driving all residential customers, regardless of program status, with paper billing (approximately 2,458,759 customers) to the main customer assistance program webpage to learn more.

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 October 2022, SoCalGas sent out a bill insert to approximately 1.5 million residential customers. The bill insert included the annual eligibility guidelines. To fulfill the AB 3 mandate, SoCalGas also sent approximately 24,000 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 PY2022 due to the COVID-19 customer protections, which included a moratorium on residential 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 the pre-pandemic process resumes sometime in PY2022. In October 2022, SoCalGas also sent out a bill insert to approximately 16,300 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 Customer Assistance Programs 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 and CETF for low-cost internet service across its outreach efforts. Customer information obtained from SoCalGas's ESA Program and Gas Assistance Fund (GAF), along with 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: The SoCalGas website (www.socalgas.com) is a 24/7 communication and enrollment channel for the CARE Program. The website is promoted via monthly email blasts which direct the customer to the socalgas.com website to apply. Mailed paper applications also provide the option to apply online at socalgas.com. Customers can enroll in the CARE Program in real-time using English and Spanish online

applications through MyAccount. Customers who are already on CARE and receive a reminder via email or a letter to recertify their eligibility are directed to the website where they may recertify online. In PY2022 SoCalGas also began to offer customers selected to complete post-enrollment verification the option of uploading their documents online via socalgas.com. SoCalGas offers 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, Hmong, Farsi, Khmer, Russian, Tagalog and Thai.

Customer Contact Center (CCC): While customers are on hold to speak to a CSR, the IVR system informs them about CARE and other assistance programs. As of February 2018, CSRs began offering immediate CARE enrollment to customers who call to start new gas service or make payment arrangements. In 2022, CSRs completed the CARE enrollment of 105,392 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. All locations provided the most up-to-date CARE collateral to customers visiting in person.

Community Events: During PY2022, SoCalGas personnel along with its community partners participated in over 2,200 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 utilize 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. 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 2022 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 PY2022, SoCalGas continued its grassroots outreach efforts. The primary driver has been to establish relationships with Faith-Based Organizations (FBOs) and CBOs to enroll hard-to-reach customers. During PY2022, SoCalGas continued

working with existing organizations, and added several new key partners to expand awareness. Below are new key partners from PY2022.⁴⁹

Chinatown Service Center: Chinatown Service Center serves Los Angeles County, and has offices in Los Angeles, Alhambra, San Gabriel, and Monterey Park. Chinatown Service Center focuses on serving the Chinese Immigrant community but also serves other community members that need assistance. They provide various help such as: medical, dental, optometry, behavioral health, social services, youth services, and financial help. Chinatown Service Center is assisting the CAP outreach team by distributing CAP collateral to their clients and community members.

PARS Equality Center: SoCalGas began a partnership with PARS Equality Center in May 2022. Originally founded in 2010 in the San Francisco Bay Area, PARS Equality Center opened a second location in Sherman Oaks, CA to help communities in the San Fernando Valley and surrounding areas. The organization primarily serves the Iranian and

⁴⁹ List of organizations in PY2022 include: 211 LA County, Blindness Support Services, Catholic Charities of Orange County, Center for Family Strengthening – Promotores Collaborative of San Luis Obispo, Chinatown Service Center, Disabilities Community Resource Center, El Nido Family Centers, El Concilio 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, PARS Equality Center, Chavez Radio Group – Cesar Chavez Foundation, , Southeast Community Development Corporation (SCDC), Southern California Indian Center, Southern California Resource Services for Independent Living (SCRS-IL), South County Outreach, 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.

Persian-speaking population. PARS' multilingual staff includes case managers and attorneys who provide a full range of professional social services and legal representation. Social services provided include English as a Second Language classes, citizenship education classes, job search training programs, and financial assistance programs. PARS Equality Center provides SoCalGas Customer Assistance Programs information at their workshops and clinics held at their Sherman Oaks office.

South County Outreach: SoCalGas began a partnership with South County Outreach in July 2022. The organization, located in Irvine, CA has been helping the Orange County community since 1989. South County Outreach operates with three major tenets in mind: housing, food, and education. The organization provides homeless prevention and rapid re-housing services by offering rental and utility assistance as well as affordable housing to households who are homeless or at risk of being homeless. Their food program distributes over 700,000 pounds of emergency, non-perishable, and fresh food to over 6,000 residents annually. Additionally, the organization's educational programs help clients develop financial literacy and build professional skills to prevent homelessness and increase job opportunities.

Capitation Contractors: In 2022, 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. In 2022, information on how to participate in the capitation program was included on the SoCalGas website. Also, capitation agencies can still utilize the web link authorized for 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.

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.

Due to the increase in the number of customers with an available email address on file, SoCalGas prioritizes email communication whenever possible to deliver messages in a timely and cost-effective manner. During PY2022 SoCalGas employed the following marketing and outreach tactics: 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 2022, SoCalGas sent approximately 184,415 direct mail letters to new customers, 300,000 direct mail letters to existing customers not on CARE, and 184,660 direct mail letters to customers who fell off of the CARE Program encouraging them to reapply. 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 to receive the mailing 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 PY2022, SoCalGas approved 24,495 new online enrollments. 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's website, 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 PY2022, there were 119,491 My Account and 65,589 web transactions which include self-certification, recertification, PEV and customer opt-out, resulting in 63,557 and 58,260 approved transactions, respectively.

Third Party Door-to-Door Outreach: During PY2022, 8,617 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. 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 October 2022, which resulted in approximately 1,892 customers newly enrolled onto the CARE Program.

As discussed in section 2.4.1, SoCalGas sent out one residential bill insert in October 2022 to all residential customers not enrolled in CARE. This communication aimed to help customers that were close to meeting the guidelines the prior 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 2022, SoCalGas sent out a bill insert to 16,300 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 PY2022.

- **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 PY2022. 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 Chavez Radio Group 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, Fiesta Educativa working with parents of children with disabilities throughout Southern California, and PARS Equality that work with Persian Speaking populations and Afghan Communities of LA County.

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,⁵⁰ and these challenges continued to be top of mind in 2022. SoCalGas used this information, along with historical data about CARE-eligible households

⁵⁰ California Low-Income Needs Assessment (LINA) Final Report: Volume 1 of 3: Summary of Key Findings (2019), p. 5

who did not respond to participation invitations to craft messaging and outreach materials. To continue addressing these barriers, SoCalGas's PY2022 multi-media campaigns aimed to increase program awareness. The campaigns' 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 Hispanic, 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 to within minutes was the main theme for the 2022 CARE campaigns, and an 89% streaming video rate confirmed the audience resonated with this messaging. The messaging of easy and quick enrollment was 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 2022, SoCalGas continued 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. 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 2022, 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 PY2022, SoCalGas enrolled 62,967 SCE CARE customers into SoCalGas's CARE Program and recertified eligibility for 342,071 CARE customers to retain them for another two years.

During PY2022, SoCalGas conducted a monthly data exchange with SDG&E. The exchanges resulted in 252 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,⁵¹ SoCalGas increased the frequency of customer data exchange with participating water companies and added an additional effort in July 2020. In 2022, SoCalGas completed quarterly data exchanges with eligible and participating water utilities and

⁵¹ 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.

added 10,739 CARE participants from the low-income water rate assistance program.

Joint Utility Program Managers Meeting: In PY2022, SoCalGas, SCE, PG&E, SDG&E and Southwest Gas scheduled monthly statewide CARE meetings and continued to meet at least quarterly online to discuss CARE outreach efforts and program operation topics, issues, the Low Income Application Decision, resolutions, enhancements, and other relevant topics needing statewide utility discussion.

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 PY2022, 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 PY2022, SoCalGas enrolled 2,270 ESA Program customers in CARE.

SoCalGas's GAF Program provides qualified customers a one-time bill assistance payment for 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. The GAF Program has the same income eligibility guidelines as CARE, allowing 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 510 new participants in its CARE Program during PY2022.

In PY2022, the GAF Program provided \$277,805 in customer assistance to 3,044 customers. Funds for the program came from donations from customers, employees and shareholders.

GAF Program PY2022	Shareholder Funded Distribution	Ratepayer Funded Distribution¹	Total YTD
Beginning Balance as of 12/31/2021	\$277,395.69	\$0	\$277,395.69
Customer & Shareholder Contributions	\$315,229.31	\$0	\$315,229.31
SHARE Program Funds Transferred to GAF	\$0	\$0	\$0
Total Funds Available	315,229.31	\$0	\$3315,229.31
Administrative Fees	\$27,109.72	\$0	\$27,109.72
GAF Payments	\$277,805.49	\$0	\$277,805.49
Remaining Balance as of 12/31/2022	\$287,805.49	\$0	\$287,709.79
Customers Assisted (number)	3,044		3,044
Average Assistance	\$91.26		\$91.26

¹ There were no Ratepayer Funds used in PY2022.

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

CARE Outreach collaborates with the ESA Program at community events.

Outreach representatives were able to discuss multiple ways to save on energy bills such as the CARE discount, weatherization, and/or repairs for residences. Please see section 1.7.1 above.

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 of Orange County) and with food banks (e.g., FIND Food bank which services Imperial and Riverside Counties, LAC + USC Medical Center CAREs Programs, Foodbank of Santa Barbara South County Outreach, Unity Shoppe 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 PY2022, the online PEV application was implemented into the CARE website, providing submetered customers access to submit PEV outside of My Account. In addition, customers can 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. SoCalGas continued these practices in PY2022.

For PY2022, 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, 3,016 customers who received LIHEAP payments and 510 customers who received a GAF pledge were automatically approved for CARE and exempt from PEV for one program enrollment cycle.

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, RICOH, improving cost and operational efficiency. In PY2022, scanning by RICOH was successfully transitioned to their on-site team, further streamlining, and improving cost and efficiency. All CARE received mail is directly routed to the on-site team that is responsible for opening envelopes to sort and scan the documents. Within 24-48 hours, the scanned application images are then delivered to the CARE processing staff through an internal NAS drive and processed through SoCalGas's existing system interface. In PY2022, RICOH delivered 260,547 scanned images to SoCalGas, including single page, multi-page and return applications.

SoCalGas processed over 233,000 mailed applications (i.e. system generated, direct mail, and bill inserts) in PY2022 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 include CSR enrollment, web enrollment, IVR enrollment, mail or fax applications, outbound dial

reminder calls, leveraging with internal and external low-income programs, approval of CARE on accounts pending turn-on, and mailing and e-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 PY2022, 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 are able to re-enroll in 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 2022, the Customer Contact Center successfully enrolled 105,392 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 (MHPUUP):

Since program inception, 303 mobile home parks have converted from master-metered and sub-metered to direct utility service, impacting over

22,534 tenants, and creating 2,520 new SoCalGas customers. In 2022, 16 mobile home parks were converted to direct utility. For these tenants who participate in CARE and MBL, the two programs have been seamlessly transferred to the customers' new gas accounts for continued benefit of each program. As the MHPUCP 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 MHPUCP 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. After becoming 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 PY2022. 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 web 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 PY2022, SoCalGas processed a total of 119,491 applications received through My Account.

SoCalGas.com Website: Throughout PY2022, 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 various ID types including the last four numbers of their social security number, last four numbers of their employer identification number, cell phone number, date of birth, or driver's license number.

Look Up Your Account Number

To retrieve your account number, please enter the following information of the account holder.

*Email Address:	<input type="text"/>
*5 Digit ZIP Code of Service Address:	<input type="text"/>
*Select an ID Type:	<div><div>Last 4 of Social Security ▾</div><div><div>Last 4 of Social Security</div><div>Last 4 of Employer ID</div><div>Cellphone Number</div><div>Date of Birth</div><div>Driver's License Number</div></div></div>
*Last 4 Digits of Social Security Number (SSN):	<input type="text"/>

The customer will then be taken to the same My Account CARE page without having to log into My Account, and be able to enroll, recertify or opt-out of CARE. As of September 2022, PEV submission was also made available to submetered customers and non-My Account users in English, Spanish, Chinese, Korean and Vietnamese through

socalgas.com/careverification and the Spanish link socalgas.com/careverificacion. This resulted in 147 submitted PEV applications outside of My Account in the fourth quarter of 2022. Mobile versioning and accessibility of the SoCalGas CARE website is an ongoing offering.

In PY2022, SoCalGas processed a total of 65,589 web applications. This enhancement has improved customer service and sped up enrollments by providing instant confirmation.

Internal Customer Solutions Recertification and PEV Study:

In October 2022, at SoCalGas, the CARE program conducted an internal assessment of the recertification and PEV processes and communications. This assessment involved customer journey mapping activities to identify solutions that can improve the customer response rate. The results included several recommendations to update customer communications, including a new email for post-enrollment verification, and changes to related webpages, letters, and outbound-dialing calls. The purpose of these updates is to make the communications more engaging by emphasizing the value of the CARE discount, the online options available to customers, and the customer support resources available to them. SoCalGas expects to implement many changes as feasible and reasonable, and that these changes will help lower the attrition rate due to non-response.

2.4.9 Low CARE Penetration ZIP Codes: Discuss the strategies that were effective in targeting and enrolling these hard-to-reach households. Include the IOU's successes, short-comings, and corrective plans in ME&O strategies to enroll customers in ZIP codes that fall into these categories.

As stated in section 2.4.2, in PY2022 SoCalGas strove to target and reach eligible customers not currently enrolled in the CARE Program. Targeting geographic areas with high eligibility and low penetration was effective as it helped increase the number of eligible customers who participated in the program. Because of the high rates of eligible customers enrolled in CARE it can be difficult to make a significant impact on enrollment rates. Further, certain areas, such as those with high university student populations, show low-penetration rates, but students may not be technically eligible for the program. In the future, the program may focus its efforts on retention and reducing attrition caused by PEV and recertification.

2.5 Processing CARE Applications

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

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.06-12-038,⁵² SoCalGas implemented a four-year recertification period for self-declared customers on a fixed-income, 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 automatic CARE recertification for an additional two years. Those with a probability score less than 0.5 are mailed a recertification application.

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**.

⁵² See D.06-12-038.

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 underserved. 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 PG&E, SDG&E, SCE, and water utilities' CARE participant information to enroll customers.

In PY2022, SoCalGas worked with 37 community partners, 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 CARE Capitation agencies employed a multipurpose approach by helping their clients complete a CARE application, while also assisting the customers in enrolling in other programs they might be eligible for. New agencies are accepted based on SoCalGas's geographic needs and the agency's ability to incorporate the program into their existing services.

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 PY2022, 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 PY2022, the number of customers enrolled in CARE by SoCalGas's CARE Capitation CBOs was 32 customers, and 8,584 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 PY2022.

2.7 Pilots

CARE PEV Live Outbound Call Pilot

D.21-06-015⁵³ directed the IOUs to simultaneously conduct a coordinated six month to one-year outbound call pilot for "attempted but failed" post-enrollment verified households at a budget not to exceed \$80,000 per utility. In June of 2022, SoCal Gas began a pilot simultaneously with the other IOUs for PEV customers who did not complete the process. The main purpose is to evaluate the efforts and resources to connect CARE customers with a live CARE representative over the

⁵³ See D.21-06-015, OP 13.

phone to assist them to complete the PEV. The pilot is scheduled to end April 2023 and an Advice Letter will be filed subsequently.

2.7.1 Establishment of CHANGES Program Pilot

There were no CHANGES pilots in 2022.

2.8 Studies

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.⁵⁴

Per D.15-12-047 and D.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 supports an understanding of the program's effectiveness and ongoing reporting for success. If not, what data will be needed to do so; 3) examine net benefits of program in comparison to similar

⁵⁴ 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).

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. 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.

PG&E and Opinion Dynamics hosted a public webinar to present the draft research plan for the 2022 CHANGES Program Evaluation on July 7th, 2022.

Throughout 2022, IOU, CPUC and CBO interviews were conducted, and data was collected, reviewed, and cleaned. A draft survey was delivered, Two rounds of review were completed and Self Help for the Elderly (SHE) was updated with survey progress. The final report is being drafted and was expected in February 2023.

2.9 Miscellaneous: Describe efforts contained in Attachments 6 of the Joint Stipulation adopted in D.21.06.015

In the 2021-2026 Low Income Application proceeding, the California Emerging Technology Fund (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 Stipulation⁵⁵ was approved by the Commission and authorizes the use of CARE and ESA Program dollars to market affordable broadband for 2021 through 2026. Among the agreements in the Joint Stipulation, SoCalGas agreed to add a weblink to its website, providing a contact to obtain further information. It will also integrate an affordable broadband offer into select customer assistance program direct marketing materials biannually as determined at the discretion of each IOU. CETF will also have an opportunity to include affordable broadband offer materials into ESA Program education kits. Finally, CETF will have the opportunity to present affordable broadband opportunities to CBOs and ESA Program contractors during IOUs respective relevant meetings. In PY2022, CETF was promoted on SoCalGas's website (socalgas.com/Assistance and socalgas.com/Asistencia) and via monthly CARE emails to residential customers.

⁵⁵ See Joint Stipulation of Southern California Gas Company, San Diego Gas & Electric Company, Pacific Gas and Electric Company, Southern California Edison Company and California Emerging Technology Fund, filed November 4, 2019.

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.

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 34,660 residents in the non-residential CARE Expansion Program facilities, comprised of 730 primary facilities with 521 associated satellite facilities, and 52 farmworker housing facilities participating in the CARE Expansion Program at PY2022 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 \$1,303.99 in marketing expenses for approximately 16,300 CARE Non-Profit Group Living (NPGL) facilities bill inserts in PY2022. Due to the small number of participants, SoCalGas did not track

administrative labor costs for new CARE Expansion applications received during PY2022.

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 PY2022 was \$117.99.⁵⁶

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 PY2022 was \$703.58.⁵⁷

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-income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Chavez Radio Group in Visalia and Bakersfield to reach farm workers. During PY2022, Chavez Radio Group provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De*

⁵⁶ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

⁵⁷ *ibid.*

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 PY2022. Among those channels were agricultural workers and those living in commercial facilities. In October 2022, SoCalGas also sent out a bill insert to approximately 16,300 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 Chavez Radio Group and MICOP that work closely with agricultural and migrant workers 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 PY2022, 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.

During 2022, the SoCalGas CARE program team and SoCalGas MF SPOC Account Executive (AE) team collaborated closely in executing a strategic initiative which would streamline the CARE enrollment process for multi-property portfolio ownership groups. Together, SoCalGas was able to streamline the CARE application and enrollment process and increase customer participation.

Feedback from participating affordable housing portfolio owners has been extremely positive. As a direct result of this initiative, the MF SPOC AE team was able to deliver CARE program enrollments for 38 MF affordable living facilities, representing over 3,000 units in 2022; combined bottom-line, gas utility savings of over \$150,000.

"SoCalGas MF SPOC team acted quickly in delivering equipment upgrades and rate discounts that have helped us lower our operating costs and improve our resident experience. Importantly, the money saved on our reduced energy costs will enable us to drive the savings into the supportive services our residents need."

Jennifer Diets, CEO – People Assisting the Homeless (PATH).

Additionally, the MF SPOC AE team continues to enroll/support Project Homekey projects throughout our SoCalGas service

territory. In 2022, MF SPOC AEs also continued to support the state-wide Project Homekey Initiative (Project Homekey seeks to reduce homelessness among high-risk individuals in need of assistance). Homekey Funding partnerships enable the purchase/conversion of existing hotels/motels into long-term housing for the homeless population throughout California. In 2022, MF SPOC AEs delivered six additional Project Homekey sites into the CARE program with 286 units. Since 2021, SoCalGas has now served Project Homekey property sites with ESA and CARE services, with several other Project Homekey opportunities in the development pipeline.

In 2019, SoCalGas enhanced its ability to find possible new Expansion Program accounts and continued with this process through 2022. 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 PY2022.

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 PY2022. 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. As a result, these facilities were not asked to recertify in 2022. However, 40 facilities automatically mailed in all of the necessary documentation and were recertified in 2022.

As per the decision, the facilities are required to recertify eligibility every four years. 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.

4. FUND SHIFTING

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

See ESA Table 12 in the attachments.

4.2 Report CARE fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

See CARE Table 1 in the attachments.

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 10.5.8.2 of D. 21-06-015?

Any fund shifting activity performed in PY2022 is in compliance with fund shifting rules as laid out in D.21-06-015.

5. COMMONLY USED ACRONYMS

ACRONYM	DEFINITION
AB	Assembly Bill
AE	Account Executive
AL	Advice Letter
AMP	Arrearage Management Plan
BPO	Branch Payment Office
CALMAC	California Measurement Advisory Council
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 Services Pilot Program
CIS	Customer Information System
CPUC	California Public Utilities Commission
CSD	California Department of Community Services and
CTR	Click-through Rate
CSR	Customer Service Representative
D.	Decision
DAC	Disadvantaged Community
E&A	Enrollment & Assessment
ED	Energy Division
EE	Energy Efficiency
EM&V	Evaluation, Measurement & Verification
ESA	Energy Savings Assistance Program

ACRONYM	DEFINITION
ESA WG	Energy Savings Assistance Program Working Group
FBO	Faith Based Organization
FPG	Federal Poverty Guideline
GAF	Gas Assistance Fund
GIS	Geographic Information System
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
HTR	Hard to Reach
HVAC	Heating, Ventilation, Air Conditioning
IOU	Investor Owned Utility
IS	Installation Standards
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
LIOB	Low Income Oversight Board
MBL	Medical Baseline
MF	Multifamily
MFWB	Multifamily Whole Building
M&O	Marketing & Outreach
NEB	Non-energy Benefit
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
PATH	People Assisting the Homeless
PEV	Post Enrollment Verification
PDA	Public Document Area
PG&E	Pacific Gas and Electric Company
POA	Property Owner Authorization

ACRONYM	DEFINITION
PP	Policies & Procedures
PY	Program Year
RFP	Request for Proposal
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
SWG	Subworking Group
UAS	Universal Application System

6. APPENDIX A: COLLATERAL MATERIALS

6.1 ESA Program Tables

Summary Table

ESA Program – Expenses and Energy Savings by Program

ESA Program- Table 1 - Overall Program Expenses

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

ESA Program – Table 2A – Expenses & Energy Savings by Measures Installed –
Multifamily CAM

ESA Program – Table 2B – Expenses & Energy Savings by Measures Installed -
Multifamily Whole Building

ESA Program – Table 2C – Expenses & Energy Savings by Measures Installed –
Multifamily Whole Building

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

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 Main

ESA Program – Table 9A – Life Cycle Bill Savings by Measure – MF CAM

ESA Program – Table 9B – Life Cycle Bill Savings by Measure – Pilot Plus/Deep

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 14A Clean Energy Referral, Leveraging and Coordination

ESA Program – Table 15 - Expenditures for Pilots and Studies

ESA Program – Table 16 - Tribal Outreach

ESA Program – Table 18 – Customer Segment/Need State

6.2 CARE Tables

CARE Table 1 - Overall Program Expenses

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

CARE Table 3 – Post Enrollment Verification Results

CARE Table 4 - Self Certification and Re-Certification Applications

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

CARE Table 15 – CARE and Disadvantaged Community Enrollment

**Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
PY 2022 Summary Highlights
SOUTHERN CALIFORNIA GAS COMPANY**

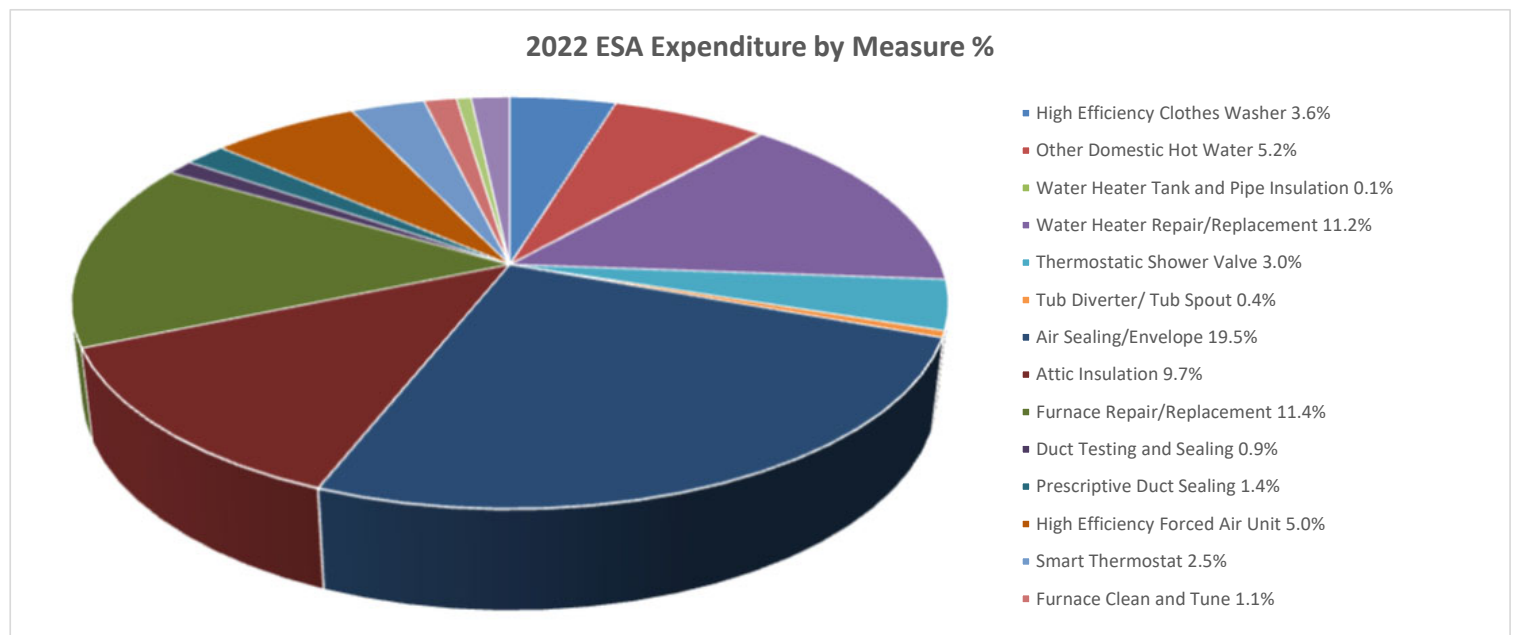
2022 Energy Savings Assistance Program Summary			
2022	Authorized / Planning Assumptions	Actual	%
Budget ¹	\$122,802,317	\$ 104,463,575	85%
Funded from 2009-2016 Unspent Funds ²	\$10,660,000	\$ 2,658,870	25%
Summary Homes Treated	94,600	105,067	111%
Summary kWh Saved	N/A	N/A	N/A
Summary kW Demand Reduced	N/A	N/A	N/A
Summary Therms Saved	1,435,220	741,410	52%

¹ Budget reflects the authorized funding in D.21-06-015. Includes all programs for the reporting period excluding MF CAM.

² D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds. Unspent funds is only applicable to MF CAM. D21-06-015 direct the IOUs to use unspent and uncommitted MF CAM funds for program years 2022 and 2023 until transition to the Multifamily Whole Building program is implemented.

2022 CARE Program Summary			
2022	Authorized Budget	Actual	%
Administrative Expenses	\$ 10,085,592	\$ 8,557,557	85%
Subsidies	\$ 135,635,133	\$ 208,143,366	153%
Service Establishment Charge	\$ 3,948,435	\$ 2,355,195	60%
Total Program Costs and Discounts	\$ 149,669,160	\$ 219,056,118	146%
2022 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	95,001	127,611	94,563
2022 CARE Enrollment	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	1,609,992	1,781,805	111%

Note: Reflects the authorized funding per year in D.21-06-015



PY 2022 Energy Savings Assistance Program Annual Report
ESA Program
Expenses by Program
SOUTHERN CALIFORNIA GAS COMPANY

ESA Program:	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF, MH, MF In-Unit) ^{1, 2}	N/A	\$ 116,291,772	\$ 116,291,772	N/A	\$ 104,436,368	\$ 104,436,368	N/A	90%	90%
ESA Multifamily Common Area Measures	N/A	\$ 10,660,000	\$ 10,660,000	N/A	\$ 2,658,870	\$ 2,658,870	N/A	25%	25%
ESA Multifamily Whole Building ³	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
ESA Pilot Plus and Pilot Deep	N/A	\$ 6,510,545	\$ 6,510,545	N/A	\$ 27,207	\$ 27,207	N/A	0.4%	0.4%
CSD Leveraging	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Building Electrification Retrofit Pilot ⁴	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Clean Energy Homes New Construction Pilot ⁴	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
SASH and MASH Unspent Funds ⁵	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
ESA Program TOTAL	N/A	\$ 133,462,317	\$ 133,462,317	\$ -	\$ 107,122,445	\$ 107,122,445		80%	80%

¹ Budget for PY 2022 includes ESA Main and MF in-unit.

² SoCalGas does not account for the ESA Main Program and ESA Multifamily In-Unit costs separately and cannot provide a breakout at this level of detail. As a result, the ESA Multifamily In-Unit authorized and actual costs are included in the ESA Main Program category.

³ Implementation to occur no earlier than January 2023.

⁴ Applicable to SCE only.

⁵ Applicable to electric utilities only.

PY 2022 Energy Savings Assistance Program Annual Report
Summary Energy and Demand Savings
SOUTHERN CALIFORNIA GAS COMPANY

ESA Program:	Authorized / Forecasted Planning Assumptions			Year to Date Actual			%		
	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF, MH, MF In-Unit) ^{1, 2}	N/A	N/A	1,435,220	N/A	N/A	632,019	N/A	N/A	44%
ESA Multifamily Common Area Measures	N/A	N/A	-	N/A	N/A	109,391	N/A	N/A	0%
ESA Multifamily Whole Building ³	N/A	N/A	-	N/A	N/A	-	N/A	N/A	0%
ESA Pilot Plus and Pilot Deep	N/A	N/A	-	N/A	N/A	-	N/A	N/A	0%
CSD Leveraging	N/A	N/A	-	N/A	N/A	-	N/A	N/A	0%
Building Electrification Retrofit Pilot ⁴	N/A	N/A	-	N/A	N/A	-	N/A	N/A	0%
Clean Energy Homes New Construction Pilot ⁴	N/A	N/A	-	N/A	N/A	-	N/A	N/A	0%
ESA Program TOTAL	N/A	N/A	1,435,220	N/A	N/A	741,410	N/A	N/A	52%

¹ Authorized/forecasted planning assumption is for entire portfolio.

² The ESA Multifamily In-Unit energy and demand savings are included in the ESA Main Program category.

³ Implementation to occur no earlier than January 2023.

⁴ Applicable to SCE only.

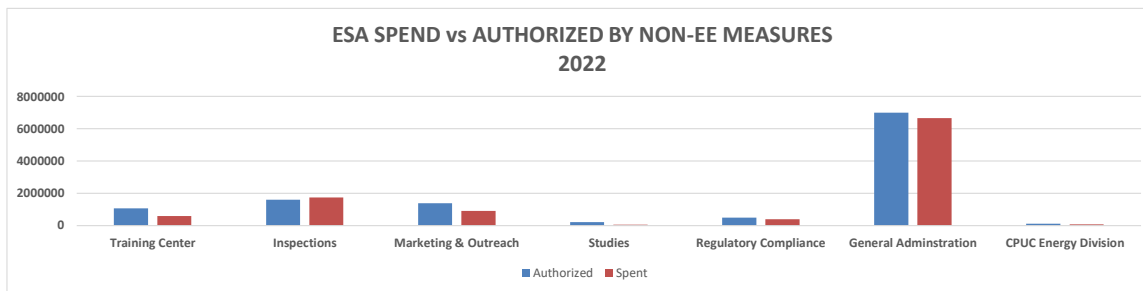
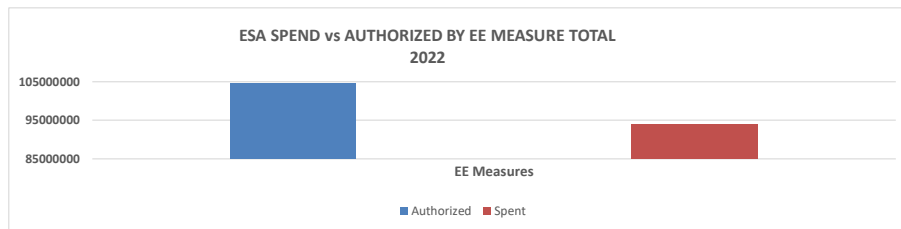
PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 1
ESA Program Main (SF, MH MF In-unit) Expenses
SOUTHERN CALIFORNIA GAS COMPANY

	2022 Authorized Budget ¹			2022 Annual Expenses ²			% of Budget Spent		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
Appliances	N/A			N/A	\$ 3,118,863	\$ 3,118,863	N/A		
Domestic Hot Water	N/A			N/A	\$ 18,827,682	\$ 18,827,682	N/A		
Enclosure	N/A			N/A	\$ 27,134,715	\$ 27,134,715	N/A		
HVAC	N/A			N/A	\$ 19,885,074	\$ 19,885,074	N/A		
Maintenance	N/A			N/A	\$ 2,611,941	\$ 2,611,941	N/A		
Lighting	N/A			N/A	\$ -	\$ -	N/A		
Miscellaneous	N/A			N/A	\$ 144,580	\$ 144,580	N/A		
Customer Enrollment	N/A			N/A	\$ 20,682,270	\$ 20,682,270	N/A		
In Home Education	N/A			N/A	\$ 1,596,991	\$ 1,596,991	N/A		
Pilot ³	N/A			N/A	\$ -	\$ -	N/A		
Energy Efficiency TOTAL	N/A	\$ 104,432,051	\$ 104,432,051	N/A	\$ 94,002,116	\$ 94,002,116	N/A	90%	90%
Training Center	N/A	\$ 1,066,865	\$ 1,066,865	N/A	\$ 586,525	\$ 586,525	N/A	55%	55%
Workforce Education and Training	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Inspections	N/A	\$ 1,606,551	\$ 1,606,551	N/A	\$ 1,752,259	\$ 1,752,259	N/A	109%	109%
Marketing and Outreach	N/A	\$ 1,383,806	\$ 1,383,806	N/A	\$ 915,947	\$ 915,947	N/A	66%	66%
Statewide Marketing Education and Outreach	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Studies	N/A	\$ 218,750	\$ 218,750	N/A	\$ 50,233	\$ 50,233	N/A	23%	23%
Regulatory Compliance	N/A	\$ 495,468	\$ 495,468	N/A	\$ 394,552	\$ 394,552	N/A	80%	80%
General Administration	N/A	\$ 6,993,078	\$ 6,993,078	N/A	\$ 6,655,993	\$ 6,655,993	N/A	95%	95%
CPUC Energy Division	N/A	\$ 95,203	\$ 95,203	N/A	\$ 78,744	\$ 78,744	N/A	83%	83%
Administration Subtotal	N/A	\$ 11,859,721	\$ 11,859,721	N/A	\$ 10,434,252	\$ 10,434,252	N/A	88%	88%
TOTAL PROGRAM COSTS	N/A	\$ 116,291,772	\$ 116,291,772	N/A	\$ 104,436,368	\$ 104,436,368	N/A	90%	90%
Funded Outside of ESA Program Budget									
Indirect Costs					\$ 3,788,609	\$ 3,788,609			
NGAT Costs					\$ 1,648,214	\$ 1,648,214			

¹ Reflects the authorized funding in D.21-06-015. Energy Efficiency budget authorized for total budget only.

² Total program cost stated here does not include MF-CAM and M&E costs funded out of unspent funds from previous cycle.

³ Pilot Plus/Deep activity reported separately in Table 2C



SOUTHERN CALIFORNIA GAS COMPANY

[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] Includes Faucet Aerators and Low Flow Showerheads
[3] Includes Water Heater Blankets and Water Heater Pipe Insulation
[4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
[5] Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1.
[6] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs
[7] Basic/Plus reporting to being in 2023
Note: Any measures noted as 'NEW' have been added during the course of this program year.
Note: Any measures noted as 'REMOVED', are no longer offered by the program but have been kept for tracking purposes.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 2A
Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measure Installed
SOUTHERN CALIFORNIA GAS COMPANY

	Table 2A ESA Program - Multifamily Common Area Measures [1]							
	Year-To-Date Completed & Expensed Installation							
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh [3] (Annual)	kW [3] (Annual)	Therms [3][10] (Annual)	Expenses [11] (\$)	% of Expenditure
ESA CAM Measures [2]								
Appliances								
High Efficiency Clothers Washer	Home	-	-	-	-	-	\$ -	0.0%
Domestic Hot Water								
Other Hot Water	Home	-	-	-	-	-	\$ -	0.0%
Tank and Pipe Insulation	Home	-	-	-	-	-	\$ -	0.0%
Water Heater Replace**	Cap-kBTUh	6	-	-	-	8,961	\$ 101,720	3.8%
Central Boiler Replace**	Cap-kBTUh	38	-	-	-	100,430	\$ 2,557,151	96.2%
Envelope								
Air Sealing/Envelope [4]	Home	-	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	-	\$ -	0.0%
HVAC								
A/C Tune-up**	Cap-Tons	-	-	-	-	-	\$ -	0.0%
Furnace Replacement**	Cap-kBTUh	-	-	-	-	-	\$ -	0.0%
Heat Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	0.0%
Programmable Thermostat	Each	-	-	-	-	-	\$ -	0.0%
		-	-	-	-	-	\$ -	0.0%
Lighting								
Exterior LED Lighting	Fixture	-	-	-	-	-	\$ -	0.0%
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	0.0%
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	0.0%
Interior LED Fixture	Fixture	-	-	-	-	-	\$ -	0.0%
Interior LED Lighting	KiloLumen	-	-	-	-	-	\$ -	0.0%
Interior LED Screw-in	Lamp	-	-	-	-	-	\$ -	0.0%
Interior TLED Type A Lamps	Lamp	-	-	-	-	-	\$ -	0.0%
Interior TLED Type C Lamps	Lamp	-	-	-	-	-	\$ -	0.0%
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	0.0%
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	0.0%
Ancillary Services								
Commissioning [5]	Home	-	-	-	-	-	\$ -	0.0%
Audit [6]	Home	-	-	-	-	-	\$ -	0.0%
Administration [7]	Home	-	-	-	-	-	\$ -	0.0%
Total	-	44	-	-	-	109,391	\$ 2,658,871	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [8]	30
Subtotal of Master-metered Multifamily Properties Treated	30
Total Number of Multifamily Tenant Units w/in Properties Treated [9]	2,767
Total Number of buildings w/in Properties Treated	44

ESA Program - Multifamily Common Area	Actual Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ -	\$ -
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ 2,658,870	\$ 2,658,870
TOTAL MF CAM COSTS	\$ -	\$ 2,658,870	\$ 2,658,870

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

Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

[3] All savings are calculated based on the following sources:

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

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

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

[6] 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.

[7] Per D.21-06-015 at p.370, administrative costs shall be capped at 10% of total multifamily costs.

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

[9] 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

[10] NMEC calculations require 12 months prior and 12 months post implementation data.

[11] Includes expenditures for projects from 2022; partial payment for projects completed in 2022 may have been included in 2021.

Note: 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

Note: Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 2B
Multifamily Whole Building Expenses and Energy Savings by Measure Installed
SOUTHERN CALIFORNIA GAS COMPANY

	Table 2B ESA Program - Multifamily Whole Building Measures [1]							
	Year-To-Date Completed & Expensed Installation							
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh [4] (Annual)	kW [4] (Annual)	Therms [4][11] (Annual)	Expenses [12] (\$)	% of Expenditure
ESA CAM Measures [2][3]								
Appliances								
High Efficiency Clothers Washer	Home	-	-	-	-	-	\$ -	0.0%
Domestic Hot Water								
Other Hot Water	Home	-	-	-	-	-	\$ -	0.0%
Tank and Pipe Insulation	Home	-	-	-	-	-	\$ -	0.0%
Water Heater Replace	Cap-kBTUh	-	-	-	-	-	\$ -	0.0%
Central Boiler Replace	Cap-kBTUh		-	-	-	-	\$ -	0.0%
Envelope								
Air Sealing/Envelope [5]	Home	-	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	-	\$ -	0.0%
HVAC								
A/C Tune-up	Cap-Tons	-	-	-	-	-	\$ -	0.0%
Furnace Replacement	Cap-kBTUh	-	-	-	-	-	\$ -	0.0%
Heat Pump Split System	Cap-Tons	-	-	-	-	-	\$ -	0.0%
Programmable Thermostat	Each	-	-	-	-	-	\$ -	0.0%
		-	-	-	-	-	\$ -	0.0%
Lighting								
Exterior LED Lighting	Fixture	-	-	-	-	-	\$ -	0.0%
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	0.0%
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	0.0%
Interior LED Fixture	Fixture	-	-	-	-	-	\$ -	0.0%
Interior LED Lighting	KiloLumen	-	-	-	-	-	\$ -	0.0%
Interior LED Screw-in	Lamp	-	-	-	-	-	\$ -	0.0%
Interior TLED Type A Lamps	Lamp	-	-	-	-	-	\$ -	0.0%
Interior TLED Type C Lamps	Lamp	-	-	-	-	-	\$ -	0.0%
Miscellaneous								
Tier-2 Smart Power Strip	Each	-	-	-	-	-	\$ -	0.0%
Variable Speed Pool Pump	Each	-	-	-	-	-	\$ -	0.0%
Ancillary Services								
Commissioning [6]	Home	-	-	-	-	-	\$ -	0.0%
Audit [7]	Home	-	-	-	-	-	\$ -	0.0%
Administration [8]	Home	-	-	-	-	-	\$ -	0.0%
Total	-	-	-	-	-	-	\$ -	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [9]	-
Subtotal of Master-metered Multifamily Properties Treated	-
Total Number of Multifamily Tenant Units w/in Properties Treated [10]	-
Total Number of buildings w/in Properties Treated	-

ESA Program - MFWB	Actual Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ -	\$ -
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
TOTAL MFWB COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

Note: MFWB Program to commence in July 2023.

[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 250% of the Federal Poverty Guidelines.

[2] Measures are customized by each IOU. Measures list may change based on available information on both costs and benefits and may vary across climate zones.

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

[4] All savings are calculated based on the following sources:

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

[5] 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

[11] NMEC calculations require 12 months prior and 12 months post implementation data.

[12] Includes expenditures for projects from 2022; partial payment for projects completed in 2022 may have been included in 2021.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 2C
Expenses and Energy Savings by Measures Installed - Pilot Plus and Pilot Deep
SOUTHERN CALIFORNIA GAS COMPANY

	ESA Program - Pilot Plus						
	Units (Each or Home)	2022 Completed & Expensed Installation					
Measures		Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses (\$)	% of Expenditures
Appliances							
High Efficiency Clothes Washer	Home	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Freezers	Each	-	-	-	-	\$ -	0.0%
New - Clothier Dryer	Each	-	-	-	-	\$ -	0.0%
New - Dishwasher	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Other Domestic Hot Water [2]	Home	-	-	-	-	\$ -	0.0%
Water Heater Tank and Pipe Insulation [3]	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Home	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
New - Solar Water Heating	Home	-	-	-	-	\$ -	0.0%
Enclosure							
Air Sealing/Envelope [4]	Home	-	-	-	-	\$ -	0.0%
New - Diagnostic Air Sealing	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
New - Floor Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
Furnace Repair/Replacement	Home	-	-	-	-	\$ -	0.0%
Room A/C Replacement	Home	-	-	-	-	\$ -	0.0%
Central A/C Replacement	Home	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Home	-	-	-	-	\$ -	0.0%
Evaporative Cooler	Home	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
Removed - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
Smart Thermostat	Home	-	-	-	-	\$ -	0.0%
New - Portable A/C	Each	-	-	-	-	\$ -	0.0%
New - Central Heat Pump-FS (propane or gas space)	Home	-	-	-	-	\$ -	0.0%
New - Wholehouse Fan	Home	-	-	-	-	\$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
New - Evaporative Cooling Maintenance	Home	-	-	-	-	\$ -	0.0%
Lighting							
Removed - Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Removed - LED Torchiere	Each	-	-	-	-	\$ -	0.0%
Removed - Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
Removed - LED Night Light	Each	-	-	-	-	\$ -	0.0%
LED Reflector Bulbs	Each	-	-	-	-	\$ -	0.0%
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
Pool Pumps	Home	-	-	-	-	\$ -	0.0%
Smart Strip Tier I	Home	-	-	-	-	\$ -	0.0%
Smart Strip Tier II	Each	-	-	-	-	\$ -	0.0%
New - Air Purifier	Home	-	-	-	-	\$ -	0.0%
Cold Storage	Each	-	-	-	-	\$ -	0.0%
New - Comprehensive Home Health and Safety Check-up	Home	-	-	-	-	\$ -	0.0%
New - CO and Smoke Alarm	Home	-	-	-	-	\$ -	0.0%
Pilots							
Customer Enrollment							
ESA Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%
ESA In-Home Energy Education	Home	-	-	-	-	\$ -	0.0%
Total Savings/Expenditures							
						\$ -	0.0%
Total Households Weatherized [5]		-					
Households Treated							
- Single Family Households Treated	Home	-					
- Multi-Family Households Treated	Home	-					
- Mobile Homes Treated	Home	-					
Total Number of Households Treated	Home	-					
# Eligible Households to be Treated for PY	Home	-					
% of Households Treated	%	0%					
- Master-Meter Households Treated	Home	-					

ESA Program - Pilot Deep						
Units (Each or Home)	2022 Completed & Expensed Installation					
	Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses (\$)	% of Expenditures
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Each	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
Home	-	-	-	-	\$ -	0.0%
					\$ -	0.0%
Total						
Home	-					
Home	-					
Home	-					
Home	-					
Home	-					
%	0%					
Home	-					

ESA Program - Pilot Plus and Pilot Deep	Actual Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ 27,207	\$ 27,207
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
<<Includes measures costs			
TOTAL Pilot Plus and Pilot Deep COSTS	\$ -	\$ 27,207	\$ 27,207

Note: Pilot Plus/Deep to commence in 2023.
[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] Includes Faucet Aerators and Low Flow Showerheads
[3] Includes Water Heater Blankets and Water Heater Pipe Insulation
[4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
[5] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs

Note: Any measures noted as 'NEW' have been added during the course of this program year.
Note: Any measures noted as 'REMOVED', are no longer offered by the program but have been kept for tracking purposes.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 2D
Expenses and Energy Savings by Measure Installed - CSD Leveraging
SOUTHERN CALIFORNIA GAS COMPANY

		ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
Measures	Units	Quantity Installed	kWh[1] (Annual)	kW[1] (Annual)	Therms[1] (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Home	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Freezers	Each	-	-	-	-	\$ -	0.0%
New - Clothier Dryer	Each	-	-	-	-	\$ -	0.0%
New - Dishwasher	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Other Domestic Hot Water [2]	Home	-	-	-	-	\$ -	0.0%
Water Heater Tank and Pipe Insulation [3]	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Home	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
New - Solar Water Heating	Home	-	-	-	-	\$ -	0.0%
Enclosure							
Air Sealing/Envelope [4]	Home	-	-	-	-	\$ -	0.0%
New - Diagnostic Air Sealing	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
New - Floor Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
Furnace Repair/Replacement	Home	-	-	-	-	\$ -	0.0%
Room A/C Replacement	Home	-	-	-	-	\$ -	0.0%
Central A/C Replacement	Home	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Home	-	-	-	-	\$ -	0.0%
Evaporative Cooler	Home	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
Removed - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
Smart Thermostat	Each	-	-	-	-	\$ -	0.0%
New - Portable A/C	Each	-	-	-	-	\$ -	0.0%
New - Central Heat Pump-FS (propane or gas space)	Home	-	-	-	-	\$ -	0.0%
New - Wholehouse Fan	Home	-	-	-	-	\$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
New - Evaporative Cooling Maintenance	Home	-	-	-	-	\$ -	0.0%
Lighting							
Removed - Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Removed - LED Torchiere	Each	-	-	-	-	\$ -	0.0%
Removed - Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
Removed - LED Night Light	Each	-	-	-	-	\$ -	0.0%
LED Reflector Bulbs	Each	-	-	-	-	\$ -	0.0%
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
Pool Pumps	Home	-	-	-	-	\$ -	0.0%
Smart Strip Tier I	Home	-	-	-	-	\$ -	0.0%
Smart Strip Tier II	Each	-	-	-	-	\$ -	0.0%
New - Air Purifier	Home	-	-	-	-	\$ -	0.0%
Cold Storage	Each	-	-	-	-	\$ -	0.0%
New - Comprehensive Home Health and Safety Check	Home	-	-	-	-	\$ -	0.0%
New - CO and Smoke Alarm	Home	-	-	-	-	\$ -	0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home	-				\$ -	0.0%
In-Home Education	Home	-				\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ -	0.0%
Total Households Weatherized [5]							
CSD MF Tenant Units Treated			Total				
			-				

ESA Program - CSD Leveraging	Actual Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ -	\$ -
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
TOTAL CSD Leveraging COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

Note: No activity in 2023.

[1] All savings are calculated based on the following sources:
DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.

[2] Includes Faucet Aerators and Low Flow Showerheads

[3] Includes Water Heater Blankets and Water Heater Pipe Insulation

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

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

Note: Any measures noted as 'NEW' have been added during the course of this program year.

Note: Any measures noted as 'REMOVED', are no longer offered by the program but have been kept for tracking purposes.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 4
Detail by Housing Type and Source ¹
SOUTHERN CALIFORNIA GAS COMPANY

Customer	Housing Type	2022 Energy Savings ²				2022 Expenses
		# Homes Treated	(mWh)	MW	(Therm)	
Gas and Electric Customers						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Electric Customers (only)						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Gas Customers (only)						
Owners - Total		55,898	-	-	377,673	\$72,957,662
	Single Family	50,529			350,788	\$66,297,467
	Multi Family	697			3,565	\$752,893
	Mobile Homes	4,672			23,321	\$5,907,302
Renters - Total		49,169	-	-	254,346	\$20,691,268
	Single Family	19,274			139,998	\$10,381,362
	Multi Family	29,250			111,075	\$10,067,728
	Mobile Homes	645			3,273	\$242,179
Gas and Electric Total - ESA MFWB						
ESA Multifamily In-Unit ³						
ESA Multifamily Common Area						
ESA Multifamily Whole Building ⁴						
Totals: ⁵		105,067	-	-	632,019	\$ 93,648,930

¹ Summary data which includes ESA Main Program (SF, MH, MF In-Unit), MF CAM, MFWB, Pilot Plus/Deep and CSD Leveraging.

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 Included in ESA Main Program.

⁴ MF Whole Building Program to commence July 2023.

⁵ Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1.

Shared Service Territory

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2022	PG&E	82,280	2,499
2022	SCE	1,032,317	18,365
2022	SDG&E	14,757	5

	A	B	C	D	E	F	G
	PY 2022 Energy Savings Assistance Program Annual Report [1] ESA Program Table 5 ESA Program Direct Purchases & Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY						
1							
2			Contractor Type				
3			(Check one or more if applicable)				
4	Contractor	County [2]	Private	CBO	WMDVBE	LIHEAP	2022 Annual Expenditures [3]
5	ADVANCED CONTRACTING SERVICES INC	F, Ke, Ki, LA, SLO, T, V	x	-	-	-	\$ 177,341
6	ARCA RECYCLING INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sbe, SLO, T, V	x	-	-	-	\$ 3,396,364
7	ASSERT INC	LA, Sbe, V	-	x	-	-	\$ 625,715
8	ASSOCIATED CONSTRUCTION SERVICES	LA, OC, R, Sbe	x	-	x	-	\$ 1,755,420
9	AVALON CARVER COMMUNITY CENTER INC	LA	-	x	-	-	\$ 31,821
10	CAMPESINOS UNIDOS INC	I, R, Sbe	-	x	x	x	\$ 973,171
11	CARROLLCO INC	F, Ki, T	x	-	x	-	\$ 304,957
12	COMMUNITY ACTION PARTNERSHIP OF O C	OC	-	x	x	x	\$ 22,302
13	EAGLE SYSTEMS INTERNATIONAL INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	x	-	-	-	\$ 5,606,967
14	EAST LOS ANGELES COMMUNITY UNION	I, LA, OC, R, Sbe	-	x	x	-	\$ 14,210,866
15	ECO SERVICES	I, LA, R, Sbe, Sba, SLO, V	x	-	x	-	\$ 3,683,779
16	ECONO WEST INC	LA, OC, Sbe, Sba, SLO, V	x	-	x	-	\$ 796,197
17	ENVIRONMENTAL ASSESSMENT SERVICES	I, LA, OC, R, Sbe, V	x	-	x	-	\$ 2,908,446
18	FCI MANAGEMENT CONSULTANTS	LA	x	-	x	-	\$ 153,275
19	GARCIA & SONS HOME IMPROVEMENT INC	F, Ke, Ki, LA, T	x	-	x	-	\$ 209,324
20	GREEN ENERGY SOLUTIONS	OC, R, Sbe	x	-	x	-	\$ 69,529
21	JOHN HARRISON CONTRACTING INC	I, Ki, LA, R, Sbe, T	x	-	x	-	\$ 1,008,824
22	LOTUS CONSTRUCTION & PROPERTY	I, LA, OC, R, Sbe, V	-	x	x	x	\$ 377,521
23	MARAVILLA FOUNDATION	I, Ke, LA, OC, R, Sbe	-	x	x	x	\$ 11,227,612
24	OAKRIDGE ENERGY INC	I, LA, R, Sbe	x	-	x	-	\$ 590,969
25	PACIFIC COAST ENERGY CONSERVATION	Ke, Sbe, SLO	x	-	x	-	\$ 793,982
26	PROTEUS INC	F, Ke, Ki, LA, Sbe, Sba, T, V	-	x	-	-	\$ 3,550,479
27	QUALITY CONSERVATION SERVICES	LA, OC, R, Sbe	x	-	-	-	\$ 9,169,455
28	RELIABLE ENERGY MANAGEMENT INC	F, Ke, Ki, LA, OC, R, Sbe, T, V	x	-	x	-	\$ 11,893,886
29	RICHARD HEATH & ASSOCIATES INC	I, Ke, Ki, LA, OC, R, Sbe, Sba, V	x	-	x	-	\$ 1,435,959
30	SIERRA WEATHERIZATION COMPANY INC	LA, R, Sbe, V	x	-	-	-	\$ 7,312,969
31	SILICON VALLEY FOUNDATION	LA, OC, R, Sbe	x	-	x	-	\$ 4,778,837
32	SOCO AIR CONDITIONING COMPANY	LA, OC, R, Sbe	x	-	-	-	\$ 331,351
33	SPECIALTY AC HEAT INC	LA, OC	x	-	x	-	\$ 2,856,031
34	STAPLES & ASSOCIATES	Ke, LA	x	-	-	-	\$ 806,138
35	TONY'S HEATING & A/C SERVICE INC.	LA, Sbe	x	-	x	-	\$ 1,189,996
36	TRI-STATE HOME IMPROVEMENTS INC	LA, Ri, Sbe	x	-	x	-	\$ 11,314
37	TRUTEAM OF CALIFORNIA	I, LA, OC, R, Sbe	x	-	-	-	\$ 2,537,194
38	VETERANS IN COMMUNITY SERVICES INC	LA, OC, R, Sbe	-	x	x	-	\$ 1,125,186
39	WATTS LABOR COMMUNITY ACTION COMM	LA	-	x	x	-	\$ 22,157
40	Total Contractor Expenditures						\$ 95,945,331
41	[1] Summary data which includes ESA Main Program (SF, MH, MF In-Unit), MFCAM, MFWB, Pilot Plus/Deep and CSD Leveraging						
42							
43	[2] Key	Abbreviation					
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							
65	[3] The expenditures do not include a credit for the high efficiency clothes washer rebates from Municipal Water Companies - (\$289,334) and misc revenues credit for cash collected - (\$2,817). ESA Tbl 7 contractor total of \$95,653,180.27 is calculated as follows: \$95,945,331.27 - (\$289,334) - (\$2,817) = \$95,653,180.27. (See "Contractor" column ESAP Table - 7)						

PY 2022 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						2022 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs [1]	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Home	218,214	40%	29,433	27%	\$ 25,025,969	27%	329,987	60%	81,222	73%	\$ 68,622,962	73%	548,201	110,655	\$ 93,648,930	\$ 171	\$ 846
Appliances																		
High Efficiency Clothes Washer	Home	-	0%	-	0%	\$ -	0%	3,701	100%	3,701	100%	\$ 3,391,879	100%	3,701	3,701	\$ 3,391,879	\$ 916	\$ 916
Refrigerators	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Freezers	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Clothers Dryer	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Dishwasher	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Domestic Hot Water																		
Other Domestic Hot Water [2]	Home	27,931	29%	27,931	29%	\$ 1,250,456	26%	67,672	71%	67,672	71%	\$ 3,594,449	74%	95,603	95,603	\$ 4,844,905	\$ 51	\$ 51
Water Heater Tank and Pipe Insulation [3]	Home	201	16%	201	16%	\$ 6,929	14%	1,021	84%	1,021	84%	\$ 44,060	86%	1,222	1,222	\$ 50,989	\$ 42	\$ 42
Water Heater Repair/Replacement	Home	-	0%	-	0%	\$ -	0%	4,523	100%	4,523	100%	\$ 10,446,876	100%	4,523	4,523	\$ 10,446,876	\$ 2,310	\$ 2,310
Thermostatic Shower Valve	Each	9,473	17%	6,524	17%	\$ 470,091	17%	47,101	83%	31,700	83%	\$ 2,335,767	83%	56,574	38,224	\$ 2,805,858	\$ 50	\$ 73
Combined Showerhead/TSV	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Heat Pump Water Heater	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Tub Diverter/Spout	Each	812	24%	639	25%	\$ 100,992	25%	2,511	76%	1,919	75%	\$ 305,223	75%	3,323	2,558	\$ 406,215	\$ 122	\$ 159
New - Solar Water Heaing	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	2,558	\$ -	\$ -	\$ -
Enclosure																		
Air Sealing / Envelope [4]	Home	28,648	28%	28,648	28%	\$ 3,899,118	21%	73,125	72%	73,125	72%	\$ 14,381,207	79%	101,773	101,773	\$ 18,280,325	\$ 180	\$ 180
New - Diagnostic Air Sealing	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Attic Insulation	Home	1,442	33%	1,442	33%	\$ 2,842,066	31%	2,956	67%	2,956	67%	\$ 6,254,514	69%	4,398	4,398	\$ 9,096,580	\$ 2,068	\$ 2,068
New - Floor Insulation	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
HVAC																		
Furnace Repair/Replacement	Home	826	9%	826	9%	\$ 1,404,019	13%	8,310	91%	8,310	91%	\$ 9,265,917	87%	9,136	9,136	\$ 10,669,936	\$ 1,168	\$ 1,168
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	154	9%	154	9%	\$ 47,710	6%	1,653	91%	1,653	91%	\$ 788,259	94%	1,807	1,807	\$ 835,968	\$ 463	\$ 463
Energy Efficient Fan Control	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Removed - A/C Time Delay	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Prescriptive Duct Sealing	Home	466	4%	466	4%	\$ 49,483	4%	11,704	96%	11,704	96%	\$ 1,277,522	96%	12,170	12,170	\$ 1,327,005	\$ 109	\$ 109
High Efficiency Forced Air Unit (HE FAU)	Home	73	6%	73	6%	\$ 268,552.25	6%	1,227	94%	1,227	94%	\$ 4,445,385	94%	1,300	1,300	\$ 4,713,937	\$ 3,626	\$ 3,626
New - Portable A/C	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Central Heat Pump - FS (propane or gas space)	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Wholehouse Fan	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Maintenance																		
Furnace Clean and Tune	Home	2,394	14%	2,394	14%	\$ 135,775	14%	14,564	86%	14,564	86%	\$ 868,525	86%	16,958	16,958	\$ 1,004,300	\$ 59	\$ 59
Central A/C Tune-up	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Evaorative Cooling Maintenance	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Lighting																		
Removed - Interior Hard wired LED fixtures	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Exterior Hard wired LED fixtures	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Removed - LED Torchiere	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Removed - Occupancy Sensor	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Removed - LED Night Light	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
LED Reflector Bulbs	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
LED A-Lamps	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%	-	-	\$ -	\$ -	\$ -
Smart Power Strips - Tier 2	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Air Purifier	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
Cold Storage	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
New - Comprehensive Home Health and Safety Check-up	Home	442	6%	442	6%	\$ 28,246.05	6%	6,447	94%	6,447	94%	\$ 412,610	94%	6,889	6,889	\$ 440,856	\$ 64	\$ 64
New - CO and Smoke Alarm	Home	226	4%	226	4%	\$ 52,349.25	4%	5,376	96%	5,376	96%	\$ 1,118,747	96%	5,602	5,602	\$ 1,171,096	\$ 209	\$ 209
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	561	6%	561	6%	\$ 145,601	6%	8,098	94%	8,098	94%	\$ 2,167,134	94%	8,659	8,659	\$ 2,312,735	\$ 267	\$ 267
Outreach & Assessment																		
Customer Enrollment	Home	84,092	70%	84,092	70%	\$ 13,362,166	66%	36,310	30%	36,310	30%	\$ 6,997,487	34%	120,402	120,402	\$ 20,359,653	\$ 169	\$ 169
In-Home Education	Home	60,473	64%	60,473	64%	\$ 962,415	65%	33,688	36%	33,688	36%	\$ 527,404	35%	94,161	94,161	\$ 1,489,819	\$ 16	\$ 16
[1] Total Savings/Expenditures amount does not include credits, expenses or required adjustments that are reflected in ESA Program Table 1.																		
[2] Includes Faucet Aerators and Low Flow Showerheads																		
[3] Includes Water Heater Blankets and Water Heater Pipe Insulation																		
[4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.																		
Note: Any measures noted as 'NEW' have been added during the course of this program year.																		
Note: Any measures noted as 'REMOVED', are no longer offered by the program but have been kept for tracking purposes.																		

	A	B	C	D	E
1	PY 2022 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	ESA Program Main (SF, MH, MF In-Unit)				
5	Appliances	\$ -	\$ -	\$ 3,118,863	\$ 3,118,863
6	Domestic Hot Water ⁴	\$ -	\$ (2,806)	\$ 18,830,488	\$ 18,827,682
7	Enclosure ⁴	\$ -	\$ (1,330)	\$ 27,136,044	\$ 27,134,715
8	HVAC ⁴	\$ -	\$ (7,797)	\$ 19,892,872	\$ 19,885,074
9	Maintenance ⁴	\$ -	\$ (40)	\$ 2,611,981	\$ 2,611,941
10	Lighting	\$ -	\$ -	\$ -	\$ -
11	Miscellaneous ⁵	\$ -	\$ -	\$ 144,580	\$ 144,580
12	Customer Enrollment ⁴	\$ 7,288	\$ 1,948	\$ 20,673,034	\$ 20,682,270
13	In Home Education	\$ -	\$ 103,932	\$ 1,493,060	\$ 1,596,991
14	Pilot	\$ -	\$ -	\$ -	\$ -
15	Multifamily Common Area Measures				
16	Appliances	\$ -	\$ -	\$ -	\$ -
17	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
18	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
19	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
20	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
21	Lighting	\$ -	\$ -	\$ -	\$ -
22	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
23	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
24	In Home Education	\$ -	\$ -	\$ -	\$ -
25	Pilot	\$ -	\$ -	\$ -	\$ -
26	Multifamily Whole Building				
27	Appliances	\$ -	\$ -	\$ -	\$ -
28	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
29	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
30	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
31	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
32	Lighting	\$ -	\$ -	\$ -	\$ -
33	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
34	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
35	In Home Education	\$ -	\$ -	\$ -	\$ -
36	Pilot	\$ -	\$ -	\$ -	\$ -
37	Pilot Plus/Deep				
38	Appliances	\$ -	\$ -	\$ -	\$ -
39	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
40	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
41	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
42	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
43	Lighting	\$ -	\$ -	\$ -	\$ -
44	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
45	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
46	In Home Education	\$ -	\$ -	\$ -	\$ -
47	Pilot	\$ -	\$ -	\$ -	\$ -
48	CSD Leveraging				
49	Appliances	\$ -	\$ -	\$ -	\$ -
50	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
51	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
52	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
53	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
54	Lighting	\$ -	\$ -	\$ -	\$ -
55	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
56	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
57	In Home Education	\$ -	\$ -	\$ -	\$ -
58	Pilot	\$ -	\$ -	\$ -	\$ -
59	Energy Efficiency TOTAL	\$ 7,288	\$ 93,907	\$ 93,900,921	\$ 94,002,116
60	Administrative ⁷				
61	Training Center	\$ 581,694	\$ 4,830	\$ -	\$ 586,525
62	Worforce Education and Training	\$ -	\$ -	\$ -	
63	Inspections	\$ -	\$ -	\$ 1,752,259	\$ 1,752,259
64	Marketing and Outreach	\$ 31	\$ 915,916		\$ 915,947
65	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
66	Measurement and Evaluation Studies	\$ 73	\$ 50,160	\$ -	\$ 50,233
67	Regulatory Compliance	\$ 394,031	\$ 521	\$ -	\$ 394,552
68	General Administration	\$ 4,686,197	\$ 1,969,796	\$ -	\$ 6,655,993
69	CPUC Energy Division	\$ -	\$ 78,744	\$ -	\$ 78,744
70	Administrative Total	\$ 5,662,026	\$ 3,019,967	\$ 1,752,259	\$ 10,434,252
71					
72	TOTAL PROGRAM COSTS ⁶	\$ 5,669,314	\$ 3,113,874	\$ 95,653,180	\$ 104,436,368
73					

	A	B	C	D	E	F	G	H
1	PY 2022 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	0	1	0	0	7	0	0
5	Imperial	36	3	1	42	14	2	13
6	Kern	2691	15	0	9	26	3	3
7	Kings	257	0	0	5	5	9	1
8	Los Angeles	1,111	194	1	96	434	203	42
9	Orange	560	6	0	46	116	10	12
10	Riverside	3,236	181	0	48	182	60	18
11	San Bernardino	2,632	99	0	79	93	35	9
12	San Luis Obispo	25	0	0	1	14	1	0
13	Santa Barbara	55	0	0	1	22	0	1
14	Tulare	124	13	0	12	49	39	17
15	Ventura	4	1	0	0	16	4	1
16	Total	10,731	513	2	339	978	366	117
17								
18	¹ Summary data for SCG ESA Program and does not include CSD Leveraging and MF Common Area efforts.							
19								
20								
21								
22	ESA Coordinated Treatment (SCE and SoCalGas only)							
23		Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency ¹						
24	# 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		
25	5,559	277	434	-	53	4,795		
26								
27								
28	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 2022 Energy Savings Assistance Program Annual Report ESA Program Table 9 Life Cycle Bill Savings by Measure - ESA Program Main (SF, MH, MF In-Unit) [1] SOUTHERN CALIFORNIA GAS COMPANY						
2	Measure Description		2022 Number Installed	Per Measure Electric Impact (kWh) [2]	Per Measure Gas Impact (Therms) [2]	Effective Useful Life (EUL)	2022 Total Measure Life Cycle Bill Savings [3]
3	Appliances						
4	High Efficiency Clothes Washer	Home	3,701	-	73,672	11	\$ 1,216,063
5	Refrigerators	Each	-	-	-	-	\$ -
6	Freezers	Each	-	-	-	-	\$ -
7	New - Clothier Dryer	Each	-	-	-	-	\$ -
8	New - Dishwasher	Each	-	-	-	-	\$ -
9	Domestic Hot Water						
10	Other Domestic Hot Water [4]	Home	95,603	-	302,105	10	\$ 4,533,346
11	Water Heater Tank and Pipe Insulation [5]	Home	1,222	-	7,760	9	\$ 104,797
12	Water Heater Repair/Replacement	Home	4,523	-	10,810	11	\$ 178,434
13	Thermostatic Shower Valve	Each	56,574	-	92,216	10	\$ 1,383,773
14	Combined Showerhead/TSV	Each	-	-	-	-	\$ -
15	Heat Pump Water Heater	Each	-	-	-	-	\$ -
16	Tub Diverter/ Tub Spout	Each	3,323	-	18,675	10	\$ 280,238
17	New - Solar Water Heating	Home	-	-	-	-	\$ -
18	Enclosure						
19	Air Sealing/Envelope [6]	Home	101,773	-	44,545	11	\$ 735,286
20	New - Diagnostic Air Sealing	Home	-	-	-	-	
21	Attic Insulation	Home	4,398	-	125,592	20	\$ 3,769,217
22	New - Floor Insulation	Home	-	-	-	-	\$ -
23	HVAC						
24	Furnace Repair/Replacement	Home	9,136	-	(241,239)	20	\$ (7,240,000)
25	Room A/C Replacement	Home	-	-	-	-	\$ -
26	Central A/C Replacement	Home	-	-	-	-	\$ -
27	Heat Pump Replacement	Home	-	-	-	-	\$ -
28	Evaporative Cooler	Home	-	-	-	-	\$ -
29	Duct Testing and Sealing	Home	1,807	-	20,076	3	\$ 90,376
30	Energy Efficient Fan Control	Home	-	-	-	-	\$ -
31	Removed - A/C Time Delay	Home	-	-	-	-	\$ -
32	Prescriptive Duct Sealing	Home	12,170	-	135,209	3	\$ 608,676
33	High Efficiency Forced Air Unit (HE FAU)	Home	1,300	-	22,650	20	\$ 679,771
34	Smart Thermostat	Home	8,659	-	40,807	9	\$ 557,234
35	New - Portable A/C	Each	-	-	-	-	\$ -
36	New - Central Heat Pump-FS (propane or gas	Home	-	-	-	-	\$ -
37	New - Wholehouse Fan	Home	-	-	-	-	\$ -
38	Maintenance						
39	Furnace Clean and Tune	Home	16,958	-	(20,858)	3	\$ (93,899)
40	Central A/C Tune up	Home	-	-	-	-	\$ -
41	New - Evaporative Cooling Maintenance	Home	-	-	-	-	\$ -
42	Lighting						
43	Removed - Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -
44	Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -
45	Removed - LED Torchiere	Each	-	-	-	-	\$ -
46	Removed - Occupancy Sensor	Each	-	-	-	-	\$ -
47	Removed - LED Night Light	Each	-	-	-	-	\$ -
48	LED Reflector Bulbs	Each	-	-	-	-	\$ -
49	LED A-Lamps	Each	-	-	-	-	\$ -
50	Miscellaneous						
51	Pool Pumps	Home	-	-	-	-	\$ -
52	Smart Strip Tier I	Home	-	-	-	-	\$ -
53	Smart Strip Tier II	Each	-	-	-	-	\$ -
54	New - Air Purifier	Home	-	-	-	-	\$ -
55	Cold Storage	Each	-	-	-	-	\$ -
56	New - Comprehensive Home Health and Safet	Home	6,889	-	-	-	\$ -
57	New - CO and Smoke Alarm	Each	5,602	-	-	-	\$ -
58	Ancillary Services						
59	Commissioning [7]	Home	-	-	-	-	\$ -
60	Audit [8]	Home	-	-	-	-	\$ -
61	Administration [9]	Home	-	-	-	-	\$ -
62	Pilots						
63	Smart Thermostat	Home	-	-	-	-	\$ -
64			-	-	-	-	\$ -
65	Total		333,638	-	632,019	-	\$ 6,803,313
66							
67	Total Homes Served By the Program	105,067					
68	Life Cycle Bill Savings Per Home						\$ 64.75
69							
70	[1] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.						
71	[2] All savings are calculated based on the following sources:						
72	DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.						
73	[3] Average rates for kWh and therms paid by ESA participants in 2022 was used to calculate lifecycle bill savings.						
74	[4] Includes Faucet Aerators and Low Flow Showerheads						
75	[5] Includes Water Heater Blankets and Water Heater Pipe Insulation						
76	[6] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.						
77	[7] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.						
78	[8] Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.						
79	[9] Per D.17-12-009 at p.213, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.						

ESA-Table 9

	A	B	C	D	E	F	G
1	PY 2022 Energy Savings Assistance Program Annual Report ESA Program Table 9A Life Cycle Bill Savings by Measure - ESA MF CAM [1] SOUTHERN CALIFORNIA GAS COMPANY						
2							
3	Measure Description [2] [3]		2022 Number Installed	Per Measure Electric Impact (kWh) [4]	Per Measure Gas Impact (Therms) [4]	Effective Useful Life (EUL)	2022 Total Measure Life Cycle Bill Savings [5]
4	Appliances						
5	High Efficiency Clothes Washer	Home	-	-	-	-	\$ -
6							
7							
8							
9	Domestic Hot Water						
10	Other Hot Water	Home	-	-	-	-	\$ -
11	Tank and Pipe Insulation	Home	-	-	-	-	\$ -
12	Water Heater Replace**	Home	6	-	8,961	11	\$ 147,914
13	Central Boiler Replace**	Home	38	-	100,430	20	\$ 3,014,073
14	Enclosure						
15	Air Sealing / Envelope [6]	Home	-	-	-	-	\$ -
16	Attic Insulation	Home	-	-	-	-	\$ -
17	HVAC						
18	A/C Tune-up**	Home	-	-	-	-	\$ -
19	Furnace Replacement**	Home	-	-	-	-	\$ -
20	Heat Pump Split System**	Home	-	-	-	-	\$ -
21	Programmable Thermostat	Home	-	-	-	-	\$ -
22	Lighting						
23	Exterior LED Lighting	Each	-	-	-	-	\$ -
24	Exterior LED Lighting - Pool	Each	-	-	-	-	\$ -
25	Interior LED Exit Sign	Each	-	-	-	-	\$ -
26	Interior LED Fixture	Each	-	-	-	-	\$ -
27	Interior LED Lighting	Each	-	-	-	-	\$ -
28	Interior LED Screw-in	Each	-	-	-	-	\$ -
29	Interior TLED Type A Lamps	Each	-	-	-	-	\$ -
30	Interior TLED Type C Lamps	Each	-	-	-	-	\$ -
31	Miscellaneous						
32	Tier-2 Smart Power Strip	Each	-	-	-	-	\$ -
33	Variable Speed Pool Pump	Each	-	-	-	-	\$ -
34	Ancillary Services						
35	Commissioning [7]	Home	-	-	-	-	\$ -
36	Audit [8]	Home	-	-	-	-	\$ -
37	Administration [9]	Home	-	-	-	-	\$ -
38	Pilots						
39	Smart Thermostat	Home	-	-	-	-	\$ -
40							
41	Total		44		109,391		\$ 3,161,987
42							
43	Total Homes Served By the Program	2,767					
44	Life Cycle Bill Savings Per Home						\$ 1,143
45							
46	[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 250% of the Federal Poverty Guidelines.						
47	[2] Measures are customized by each IOU. Measures list may change based on available information on both costs and benefits and may vary across climate zones.						
48	[3] Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.						
49	[4] All savings are calculated based on the following sources:						
50	DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019. Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.						
51	[5] Average rates for kWh and therms paid by ESA participants in 2022 was used to calculate lifecycle bill savings.						
52	[6] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.						
53	[7] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.						
54	[8] Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.						
55	[9] Per D.17-12-009 at p.213, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.						

	A	B	C	D	E	F	G
	PY 2022 Energy Savings Assistance Program Annual Report						
	ESA Program Table 9A						
	Life Cycle Bill Savings by Measure - ESA Pilot Plus/Deep						
1	SOUTHERN CALIFORNIA GAS COMPANY						
2							
3	Measure Description		2022 Number Installed	Per Measure Electric Impact (kWh) [1]	Per Measure Gas Impact (Therms) [1]	Effective Useful Life (EUL)	2022 Total Measure Life Cycle Bill Savings [2]
4	Appliances						
5	High Efficiency Clothes Washer	Home	-	-	-	-	\$ -
6	Refrigerators	Each	-	-	-	-	\$ -
7	Freezers	Each	-	-	-	-	\$ -
8	New - Clothier Dryer	Each	-	-	-	-	\$ -
9	New - Dishwasher	Each	-	-	-	-	\$ -
10	Domestic Hot Water						
11	Other Domestic Hot Water [3]	Home	-	-	-	-	\$ -
12	Water Heater Tank and Pipe Insulation [4]	Home	-	-	-	-	\$ -
13	Water Heater Repair/Replacement	Home	-	-	-	-	\$ -
14	Thermostatic Shower Valve	Each	-	-	-	-	\$ -
15	Combined Showerhead/TSV	Each	-	-	-	-	\$ -
16	Heat Pump Water Heater	Each	-	-	-	-	\$ -
17	Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -
18	New - Solar Water Heating	Home	-	-	-	-	\$ -
19	Enclosure						
20	Air Sealing/Envelope [5]	Home	-	-	-	-	\$ -
21	New - Diagnostic Air Sealing	Home	-	-	-	-	\$ -
22	Attic Insulation	Home	-	-	-	-	\$ -
23	New - Floor Insulation	Home	-	-	-	-	\$ -
24	HVAC						
25	Furnace Repair/Replacement	Home	-	-	-	-	\$ -
26	Room A/C Replacement	Home	-	-	-	-	\$ -
27	Central A/C Replacement	Home	-	-	-	-	\$ -
28	Heat Pump Replacement	Home	-	-	-	-	\$ -
29	Evaporative Cooler	Home	-	-	-	-	\$ -
30	Duct Testing and Sealing	Home	-	-	-	-	\$ -
31	Energy Efficient Fan Control	Home	-	-	-	-	\$ -
32	Removed - A/C Time Delay	Home	-	-	-	-	\$ -
33	Prescriptive Duct Sealing	Home	-	-	-	-	\$ -
34	High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -
35	Smart Thermostat	Home	-	-	-	-	\$ -
36	New - Portable A/C	Each	-	-	-	-	\$ -
37	New - Central Heat Pump-FS (propane or gas	Home	-	-	-	-	\$ -
38	New - Wholehouse Fan	Home	-	-	-	-	\$ -
39	Maintenance						
40	Furnace Clean and Tune	Home	-	-	-	-	\$ -
41	Central A/C Tune up	Home	-	-	-	-	\$ -
42	New - Evaporative Cooling Maintenance	Home	-	-	-	-	\$ -
43	Lighting						
44	Removed - Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -
45	Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -
46	Removed - LED Torchiere	Each	-	-	-	-	\$ -
47	Removed - Occupancy Sensor	Each	-	-	-	-	\$ -
48	Removed - LED Night Light	Each	-	-	-	-	\$ -
49	LED Reflector Bulbs	Each	-	-	-	-	\$ -
50	LED A-Lamps	Each	-	-	-	-	\$ -
51	Miscellaneous						
52	Pool Pumps	Home	-	-	-	-	\$ -
53	Smart Strip Tier I	Home	-	-	-	-	\$ -
54	Smart Strip Tier II	Each	-	-	-	-	\$ -
55	New - Air Purifier	Home	-	-	-	-	\$ -
56	Cold Storage	Each	-	-	-	-	\$ -
57	New - Comprehensive Home Health and Safety	Home	-	-	-	-	\$ -
58	New - CO and Smoke Alarm	Each	-	-	-	-	\$ -
59	Ancillary Services						
60	Commissioning [6]	Home	-	-	-	-	\$ -
61	Audit [7]	Home	-	-	-	-	\$ -
62	Administration [8]	Home	-	-	-	-	\$ -
63	Pilots						
64	Smart Thermostat	Home	-	-	-	-	\$ -
65				-	-	-	
66	Total		-	-	-	-	\$ -
67							
68	Total Homes Served By the Program						
69	Life Cycle Bill Savings Per Home						\$ -
70							
71	Note: Pilot Plus/Deep to commence in 2023.						
72	[1] All savings are calculated based on the following sources:						
73	DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019. Per measure kWh and therm						
74	impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.						
75	[2] Average rates for kWh and therms paid by ESA participants in 2022 was used to calculate lifecycle bill savings.						
76	[3] Includes Faucet Aerators and Low Flow Showerheads						
77	[4] Includes Water Heater Blankets and Water Heater Pipe Insulation						
78	[5] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and						
79	minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.						
80	[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.						

	A	B	C	D	E
1	PY 2022 Energy Savings Assistance Program Annual Report ESA Program Table 11 Bill Savings Calculations by Program Year ¹ SOUTHERN CALIFORNIA GAS COMPANY				
2	Table 11 - ESA Program Main (SF, MH, MF In-Unit)				
3	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
4	2013	\$ 97,554,614	\$ 14,434,223	0.15	\$ 135
5	2014	\$ 93,781,355	\$ 13,802,052	0.15	\$ 147
6	2015	\$ 74,817,588	\$ 9,458,585	0.13	\$ 118
7	2016	\$ 58,777,190	\$ 10,005,458	0.17	\$ 143
8	2017	\$ 79,364,204	\$ 10,752,700	0.14	\$ 115
9	2018	\$ 93,149,896	\$ 10,559,891	0.11	\$ 106
10	2019 ¹	\$ 111,539,060	\$ 5,544,743	0.05	\$ 45
11	2020	\$ 96,838,449	\$ 5,169,470	0.05	\$ 41
12	2021	\$ 111,430,005	\$ 6,952,602	0.06	\$ 53
13	2022	\$ 104,436,368	\$ 6,803,313	0.07	\$ 65
14					
15	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				
16	¹ Savings are based on the results of the 2015-2017 Impact Evaluation completed in 2019, starting from PY2019.				
17					
18	Table 11A - Pilot Plus/Deep				
19	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
20	2013				
21	2014				
22	2015				
23	2016				
24	2017				
25	2018				
26	2019 ¹				
27	2020				
28	2021				
29	2022	N/A	N/A	N/A	N/A
30					
31	Note: Pilot Plus/Deep to commence in 2023.				
32					
33	Table 11B - MF CAM and MFWB				
34	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
35	2013				
36	2014				
37	2015				
38	2016				
39	2017				
40	2018				
41	2019 ¹				
42	2020				
43	2021				
44	2022	\$ 2,658,870	\$ 3,161,987	1.19	\$ 1,143
45					
46	Note: MFWB implementation to occur no earlier than January 2023. Data only reflects MF CAM.				

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 12
Fund Shifting ¹
SOUTHERN CALIFORNIA GAS COMPANY

		FUND SHIFT AMOUNT																									
		Budget ¹			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year			Carry Forward from 2021			Carry Back from 2023										
Date	Program Year 2022	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized			Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization		
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total								
	ESA Program:	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%				G-xxxx, D.xx- xx-xxx		
	Energy Efficiency																										
	Appliance	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Domestic Hot Water	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Enclosure	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	HVAC	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Maintenance	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Lighting	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Miscellaneous	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Customer Enrollment	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	In Home Education	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Pilot	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Fund Shifting Offset	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Energy Efficiency TOTAL	\$ -	\$ 104,432,051	\$ 104,432,051	\$ -	\$ 94,002,116	\$ -	\$ -	\$ 10,429,935	\$ 10,429,935	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Training Center	\$ -	\$ 1,066,865	\$ 1,066,865	\$ -	\$ 586,525	\$ 586,525	\$ -	\$ 480,340	\$ 480,340	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.		
	Inspections	\$ -	\$ 1,606,551	\$ 1,606,551	\$ -	\$ 1,752,259	\$ 1,752,259	\$ -	\$ (145,708)	\$ (145,708)	\$ -	\$ 145,708	\$ 145,708	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 145,708	0%	1. 2. 3.	1. Current Year Authorized	1. 2022	Administration to fund overspend in Inspections	1. D.21-06-015_CARE FERA ESA PY 21-26	
	Marketing and Outreach	\$ -	\$ 1,383,806	\$ 1,383,806	\$ -	\$ 915,947	\$ 915,947	\$ -	\$ 467,859	\$ 467,859	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Statewide ME&O	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	M&E Studies	\$ -	\$ 218,750	\$ 218,750	\$ -	\$ 50,233	\$ 50,233	\$ -	\$ 168,517	\$ 168,517	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	0.00%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Regulatory Compliance	\$ -	\$ 495,468	\$ 495,468	\$ -	\$ 394,552	\$ 394,552	\$ -	\$ 100,916	\$ 100,916	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	General Administration	\$ -	\$ 6,993,078	\$ 6,993,078	\$ -	\$ 6,655,993	\$ 6,655,993	\$ -	\$ 337,085	\$ 337,085	\$ -	\$ (145,708)	\$ (145,708)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	(145,708)	0%	1. 2. 3.	1. Current Year Authorized	1. 2022	Administration to fund overspend in Inspections	1. D.21-06-015_CARE FERA ESA PY 21-26
	CPUC Energy Division ²	\$ -	\$ 95,203	\$ 95,203	\$ -	\$ 78,744	\$ 78,744	\$ -	\$ 16,459	\$ 16,459	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	TOTAL PROGRAM COSTS	\$ -	\$ 116,291,772	\$ 116,291,772	\$ -	\$ 104,436,368	\$ 104,436,368	\$ -	\$ 11,855,404	\$ 11,855,404	\$ -	\$ (0)	\$ (0)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	(0)	0%					
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ -	\$ 116,291,772	\$ 116,291,772	\$ -	\$ 104,436,368	\$ 104,436,368	\$ -	\$ 11,855,403	\$ 11,855,403	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -							

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.

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

	A	B
1	PY 2022 Energy Savings Assistance Program Annual Report	
2	ESA Program Table 13	
3	Categorical and Other Enrollment ¹	
4	SOUTHERN CALIFORNIA GAS COMPANY	
5		
6	ESA Main (SF, MH, MF In-Unit)	
7	Type of Enrollment	Number of Homes Treated
8	Women, Infants, and Children Program (WIC)	843
9	Supplemental Security Income (SSI)	723
10	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	637
11	CalWORKs/Temporary Assistance for Needy Families (TANF)	40
12	Tribal TANF	1
13	Medi-Cal	13,039
14	Medicaid/Medi-Cal for Families	161
15	Healthy Families A&B	0
16	National School Lunch Program (NSLP) - Free Lunch	209
17	Low-income Home Energy Assistance Program (LIHEAP)	40
18	Bureau of Indian Affairs General Assistance	0
19	Head Start Income Eligible - (Tribal Only)	0
20	Other	1,945
21	Total	17,638
22		
23	¹ Summary data which includes ESA Program and CSD Leveraging efforts.	
24	Note: Does not include MF common area efforts.	
25		
26	MF CAM	
27	Type of Enrollment	Number of Homes Treated
28	Women, Infants, and Children Program (WIC)	
29	Supplemental Security Income (SSI)	
30	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
31	CalWORKs/Temporary Assistance for Needy Families (TANF)	
32	Tribal TANF	
33	Medi-Cal	
34	Medicaid/Medi-Cal for Families	
35	Healthy Families A&B	
36	National School Lunch Program (NSLP) - Free Lunch	
37	Low-income Home Energy Assistance Program (LIHEAP)	
38	Bureau of Indian Affairs General Assistance	
39	Head Start Income Eligible - (Tribal Only)	
40	Other	
41	Total	-
42		
43	MF CAM In-unit included in ESA Main above. Data not available for MF CAM.	
44		
45	Pilot Plus/Deep	
46	Type of Enrollment	Number of Homes Treated
47	Women, Infants, and Children Program (WIC)	
48	Supplemental Security Income (SSI)	
49	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
50	CalWORKs/Temporary Assistance for Needy Families (TANF)	
51	Tribal TANF	
52	Medi-Cal	
53	Medicaid/Medi-Cal for Families	
54	Healthy Families A&B	
55	National School Lunch Program (NSLP) - Free Lunch	
56	Low-income Home Energy Assistance Program (LIHEAP)	
57	Bureau of Indian Affairs General Assistance	
58	Head Start Income Eligible - (Tribal Only)	
59	Other	
60	Total	-
61		
62	Pilot Plus/Deep to commence in 2023.	

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 14
Leveraging & Integration
SOUTHERN CALIFORNIA GAS COMPANY

ESA Program Main (SF, MH, MF In-Unit)

Coordination Type ¹	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Saving 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	\$632,237	N/A	N/A	704	See note "A".	Yes	N/A
Leveraging	Pasadena Water and Power (PWP)	SoCalGas has a signed leveraging contract with PWP	Yes	Yes	\$6,609	N/A	N/A	5	See note "A".	Yes	N/A
Leveraging	Riverside Public Utilities	SoCalGas has a signed leveraging contract with RPI	Yes	Yes	\$604,425	N/A	N/A	1,000	See note "A".	Yes	N/A
Leveraging	Easern Municipal Water District (EWMD)	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$16,640	N/A	N/A	256	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	\$23,219	N/A	N/A	1,069	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	\$20,400	N/A	N/A	136	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	\$1,477,643	N/A	N/A	15,869	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	\$6,900	N/A	N/A	46	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	\$4,071	N/A	N/A	233	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	\$16,853	N/A	N/A	908	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	\$887	N/A	N/A	29	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	\$2,787	N/A	N/A	193	See note "A".	Yes	N/A

MF CAM and MFWB

[illegible]

MF CAM is 100% no-cost direct install. No opportunity to integrate Energy Efficiency co-funded programs.
MF Whole Building to commence in July 2023.

Pilot Plus/Deep[illegible]

Pilot Plus/Deep to commence in 2023.

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 2022 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".

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 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 14A
Clean Energy Referral, Leveraging, and Coordination
SOUTHERN CALIFORNIA GAS COMPANY

Partner	Brief Description of Effort	# of Referrals [1]	# of Leveraging	# of Coordination Efforts	# of Leads [2]	# of Enrollments from Successful Leads
CARE	CARE customers who are PEV approved are shared with ESA.				11,651	4,058
Water Agencies [3]	SoCalGas provides the ability for water agencies to capture water savings through co-funding opportunities.		10			18,779
Municipal Electric Providers [4]	SoCalGas provides co-funding opportunities to electric and water providers who might otherwise not offer energy savings measures.		3			1,669
Project Homekey (Properties)	SoCalGas' ESA Program provides energy efficiency services at no cost to Project Homekey sites.				25	16

Note:

Leveraging activities would include when programs share resources to jointly support program delivery or administration.

While coordination refers more generally to program communication, collaboration, and alignment of activities to support individual program delivery.

[1] # of referrals includes leads provided to a Partner Program by ESA

[2] # of leads includes customer leads provided to ESA by Partner Program

[3] Water Agencies include: Eastern Municipal Water District, Fontana Water Company, Liberty Utilities, Metropolitan Water District, San Gabriel Valley Water Company, California American Water, Moulton Niguel Water District, Elsinore Valley Municipal Water District, Western Municipal Water District and Rancho California Water District.

[4] Municipal Electric Providers include: Anaheim Public Utilities, Pasadena Water and Power and Riverside Public Utilities.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 15
Expenditures for Pilots and Studies
SOUTHERN CALIFORNIA GAS COMPANY

	Authorized 2022 Funding ¹			2022 Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
ESA Pilot Plus/Deep Program	N/A	\$ 6,510,545	\$ 6,510,545	N/A	\$ 27,207	\$ 27,207	N/A	0%	0%
Total Pilots	N/A	\$ 6,510,545	\$ 6,510,545	N/A	\$ 27,207	\$ 27,207	N/A	0%	0%
Studies									
Needs Assessment (LINA) ²									
Joint IOU - Multifamily CAM Process Evaluation ³	N/A	\$ 62,500	\$ 62,500	N/A	\$ 42,804	\$ 42,804	N/A	68%	68%
2020 Non Energy Benefits Evaluation (NEB's)	N/A	\$ 75,000	\$ 75,000	N/A	\$ (639)	\$ (639)	N/A	-1%	-1%
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study	N/A	\$ 62,500	\$ 62,500	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study	N/A	\$ 62,500	\$ 62,500	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study	N/A	\$ 18,750	\$ 18,750	N/A	\$ 8,069	\$ 8,069	N/A	43%	43%
Load Impact Evaluation Study	N/A	\$ 375,000	\$ 375,000	N/A	\$ -	\$ -	N/A	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	N/A	\$ 125,000	\$ 125,000	N/A	\$ -	\$ -	N/A	0%	0%
Rapid Feedback Research and Analysis	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - Process Evaluation Studies (1-4 Studies)	N/A	\$ 125,000	\$ 125,000	N/A	\$ -	\$ -	N/A	0%	0%
Potential Ad Hoc Tasks	N/A	\$ 300,000	\$ 300,000	N/A	\$ -	\$ -	N/A	0%	0%
Total Studies ⁴		\$ 1,068,750	\$ 1,068,750		\$ 8,069	\$ 8,069		1%	1%

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.

² LINA Study funded out of prior cycle unspent Funds per AL 5558.

³ MF CAM study funded out of MF CAM prior cycle unspent funds per AL 5744. Current month credit due to accounting reversal of June 2022 accrual, where billing has been delayed.

⁴ Total studies amount includes 2021-2026 authorized budget in D.21-06-015 only as well as associated spending.

Outreach Status	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	6	Alpanish / Chumash Fernandeno Tataviam Band of Mission Indians Gabrieleno (Tongva) Band of Mission Indians Juaneños Band of Mission Indians Torres Martinez Band of Desert Cahuilla Indians Tule River Tribe
Tribes requested outreach materials or applications	6	<u>Tribes:</u> Alpanish / Chumash Fernandeno Tataviam Band of Mission Indians Gabrieleno (Tongva) Band of Mission Indians Juaneños Band of Mission Indians Torres Martinez Band of Desert Cahuilla Indians Tule River Tribe <u>Indigenous Organizations:</u> ASOSAL serving the Indigenous Salvadorean communities – Lenca, Maya Chorti, Maya Pocomam, Cacaoopera and Nahua Pipil Casa Cultura Maya Indigenous Women Rising
Tribes who have not accepted offer to Meet and Confer	0	As of December 31, 2022 SoCalGas did not have any tribes accept to meet and confer. SoCalGas is pending confirmation on some meetings, and scheduling into 2023.
Non-Federally Recognized Tribes who participated in Meet & Confer	3	Fernandeno Tataviam Band of Mission Indians Gabrieleno (Tongva) Band of Mission Indians Juaneños Band of Mission Indians
Tribes and Housing Authority sites involved in Focused Project/ESA Partnership offer on Tribal Lands	0	As of December 31, 2022, SoCalGas has been working in communicating with all tribes, both Federally- and Non-Federally recognized to deliver information on Customer Assistance Programs (CARE, ESA, MBL) that may benefit members of their community. SoCalGas will continue to provide informational meetings to build trust that lead to partnerships with tribal governments in 2023. No specific Focused Projects or ESA Partnerships in effect as of December 31, 2022.
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	As of December 31, 2022, SoCalGas has communicated with the following Tribes with Housing Authorities and/or TANF offices to coordinate meetings for further discussion in regards to Customer Assistance Programs (CARE, ESA, MBL): Agua Caliente Band of Cahuilla Indians Augustine Band of Cahuilla Indians Cabazon Band of Mission Indians Cahuilla Band of Indians Chemhuevi Indian Tribe Morongo Band of Mission Indians Pechanga Band of Luiseno Indians Santa Ynez Band of Chumash Indians Soboba Band of Luiseno Indians Tejon Indian Tribe Torres Martinez Band of Desert Cahuilla Indians Tule River Tribe
Housing Authority and TANF offices who participated in Meet and Confer	4	As of December 31, 2022, SoCalGas met with the following tribes that have TANF office, Chumash Santa Ynez Band of Mission Indians, Tule River Tribe, Torres Martinez Band of Desert Cahuilla Indians who have 6 TANF offices in SoCalGas service territory, and Fernandeno Tataviam Band of Mission Indian however, through programming conducted by the Tribe and their own fund generating mechanisms. SoCalGas has meetings coordinated for 2023 with additional tribes that have TANF offices.

PY 2022 Energy Savings Assistance Program Annual Report
ESA Program Table 17
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 [1]	# of Households Treated [17]	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) [18]
Demographic													
Housing Type													
SF	1,144,281	69,803	6%	623,163	11%				7.0	9.8	\$ 882		0.21
MH	127,608	5,317	4%	675	788%				4.9	8.2	\$ 938		N/A
MF In-Unit	802,673	29,947	4%	215,463	14%				3.9	4.1	\$ 176		N/A
Rent vs. Own													N/A
Own	868,032	55,898	6%	N/A	0%				6.7	10.8	\$ 1,078		0.21
Rent	1,452,048	49,161	3%	N/A	0%				5.2	5.0	\$ 235		0.21
Vacant		8	0%	N/A	0%				4.8	5.7	\$ 284		
Previous vs. New Participant													
New participant		40,272	0%	488,785	8%				6.4	8.4	\$ 689		0.14
Previous Participant		64,795	0%	351,069	18%				5.8	7.9	\$ 680		0.29
Seniors [3]	956,433	26,001	3%	N/A	0%				6.1	9.1	\$ 857		0.18
Veterans [4]	148,977	225	0%	N/A	0%				5.8	8.2	\$ 728		0.01
Hard-to-Reach [5]	860,498	59,985	7%	325,972	18%				5.2	6.4	\$ 477		0.14
Vulnerable [6]	1,482,526	96,254	6%	773,773	12%				5.8	7.8	\$ 647		0.26
Location													
DAC [7]	1,438,213	93,917	7%	759,345	12%				5.8	7.7	\$ 640		0.27
Rural	312,545	11,459	4%	70,719	16%				9.5	11.3	\$ 958		0.21
Tribal [8]	4,892	41	1%	505	8%				5.3	8.4	\$ 1,254		0.14
PSPS Zone	N/A	N/A	N/A	N/A	N/A				N/A	N/A	N/A		N/A
Wildfire Zone [9]	1,007,391	43,510	4%	370,508	12%				7.3	9.4	\$ 804		0.19
Climate Zone													
4	12,320	179	1%	582	31%				6.0	7.1	\$ 588		0.05
5	44,102	1,936	4%	9,316	21%				7.7	12.0	\$ 1,265		0.03
6	209,415	4,369	2%	24,553	18%				4.3	6.4	\$ 487		0.03
8	475,858	31,573	7%	248,262	13%				3.0	5.8	\$ 509		0.02
9	640,547	24,173	4%	186,842	13%				5.8	6.4	\$ 497		0.04
10	362,539	26,539	7%	252,574	11%				7.9	10.3	\$ 879		0.05
13	143,641	7,970	6%	40,316	20%				10.6	12.0	\$ 1,020		0.05
14	65,736	2,690	4%	31,358	9%				12.5	14.9	\$ 1,074		0.05
15	102,386	3,474	3%	20,683	17%				6.5	8.3	\$ 825		0.05
16	32,086	2,164	7%	24,657	9%				6.2	10.2	\$ 848		0.03
CARB Communities [10]	270,239	25,307	9%	193,313	13%				25.0	33.6	\$ 2,837		1.46
Financial													
CARE	1,605,166	71965	4%	486,828	15%				6.4	8.6	\$ 744		0.32
Disconnected [2]		0	0%	-	0%				-	-	\$ -		-
Arrearages [11]	760,850	54797	7%	403,208	14%				5.7	7.5	\$ 604		0.18
High Usage [12]	691,102	34570	5%	285,694	12%				6.2	8.7	\$ 760		0.22
High Energy Burden [13]		2049	0%	N/A	0%				5.9	7.9	\$ 797		0.09
SEVI [14]													
<25%	571	1	0%	16	6%				-	-	\$ 97		-
25%-50%	-	0	0%	-	0%				-	-	\$ -		-
50%-75%	1,181,494	42438	4%	400,423	11%				6.8	9.5	\$ 849		0.16
>75%	465,748	44555	10%	292,772	15%				4.8	6.2	\$ 483		0.31
Affordability Ratio [15]													
<25%	1,538,139	78139	5%	627,369	12%				6.1	8.2	\$ 699		0.19
25%-50%	16,540	2210	13%	11,563	19%				3.6	4.9	\$ 319		0.43
50%-75%	1,395	70	5%	1,007	7%				5.6	4.9	\$ 479		0.31
>75%	91,737	6575	7%	53,271	12%				2.9	4.5	\$ 335		0.21
Health Condition													
Medical Baseline	9,587	1444	15%	5,050	29%				6.6	9.7	\$ 1,021		0.02
Respiratory [16]													
<25%	272,610	2738	1%	16,356	17%				6.3	8.6	\$ 791		0.03
25%-50%	433,249	15693	4%	114,747	14%				6.2	8.2	\$ 680		0.31
50%-75%	505,591	34012	7%	286,594	12%				5.7	7.6	\$ 658		0.24
>75%	436,361	34551	8%	275,513	13%				5.6	7.7	\$ 646		0.24
Disabled [4]	684,790	8,535	1%	N/A	0%				6.5	9.0	\$ 835		0.04

* Beginning July 1, 2022, Senate Bill 756 updated P.U. Code Section 2790 by changing the income limits of ESA Program eligibility from referencing P.U. Code 739.1 (which defined low-income as households with income no greater than 200% of FPL) to now establishing the ESA Program's income limits to at or below 250% of FPL.

[1] Eligible household counts by segment provided by Athens. Segments with no data may be calculated internally at a later date.

[2] Due to the COVID customer protections, no customers have been disconnected since March 4, 2020.

[3] Senior defined as age 65 and older as self reported during enrollment.

[4] Self identified on application form.

[5] SoCalGas defines Hard to Reach as a customer who either has a language preference other than English or lives in a mobile home or multifamily dwelling unit.

[6] Vulnerable is defined as Disadvantaged Vulnerable Communities (DVC) which consists of communities in the 25% highest scoring census tracts according to the most current versions of the CalEnviroScreen, as well as all California tribal lands, census tracts that score in the highest 5% of Pollution Burden within CalEnviroScreen, but do not receive an overall CalEnviroScreen score due to unreliable public health and socioeconomic data, and census tracts with median household incomes less than 60% of state median income.

[7] As defined by CalEnviroScreen 4.0.

[8] SoCalGas uses geographic boundary information to identify federally recognized tribal areas in conjunction with an augment to the ESA application to allow for customer to self-identify as a member of a tribal community.

[9] Includes Zones 2 and 3 (Tiers 2 and 3) of the CPUC Fire-Threat Map.

[10] Neighborhoods identified by CARB Air Protection Program that overlap with DAC ZIP codes per CalEnviroScreen.

[11] SoCalGas defines arrearages as overdue balance greater than 30 days past due.

[12] SoCalGas defines high usage as at least 200% of baseline for any month within the previous calendar year.

[13] SoCalGas defines High Energy Burden as customers that have to spend 2% or more of household income on their gas bill.

[14] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. SoCalGas utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores.

[15] Threshold based on CPUC 2019 Annual Affordability Report, utilizing AR20 data.

[16] SoCalGas utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory.

[17] Households Treated data is not additive because customers may be represented in multiple categories.

[18] Applies to single family homes only.

MFWB

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			0%		0%								
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													
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Vulnerable													
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													
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
High Energy Burden			0%		0%								
SEVI			0%		0%								
Affordability Ratio													
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled													

Note: MFWB Program to commence in July 2023.

Pilot Plus and Pilot Deep

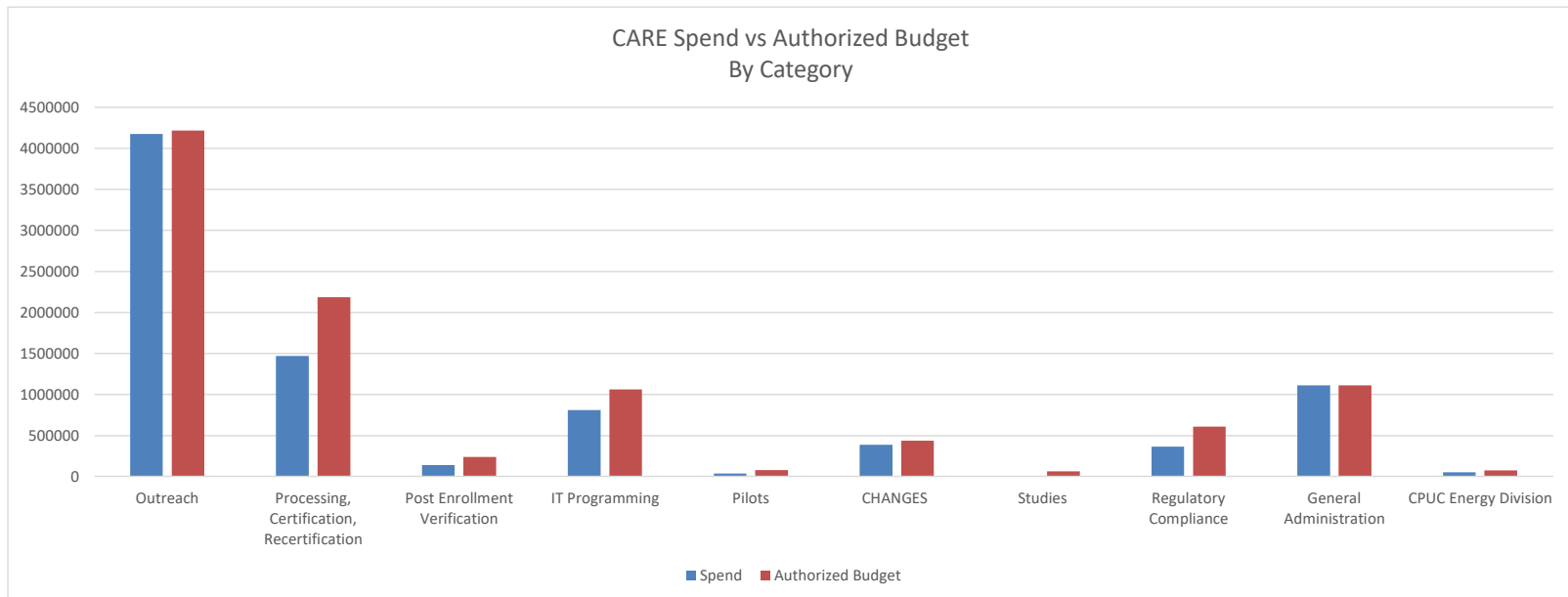
Customer Segments	# of Households Eligible	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Enrollment Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	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%								

Note: Pilot Plus/Deep to commence in 2023.

	A	B	C	D	E	F	G	H
1	PY 2022 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	N/A	\$ 4,174,095	\$4,174,095	\$ 4,216,431	99%	\$91,529	Funds shifted to Outreach from General Administration
8	Processing, Certification, Recertification	N/A	\$ 1,469,826	\$1,469,826	\$ 2,184,615	67%		
9	Post Enrollment Verification	N/A	\$ 139,564	\$139,564	\$ 241,043	58%		
10	IT Programming	N/A	\$ 809,244	\$809,244	\$ 1,063,935	76%		
11	Pilots	N/A	\$ 38,214	\$38,214	\$ 80,000	48%		
12	CHANGES	N/A	\$ 387,240	\$387,240	\$ 437,502	89%		
13	Studies	N/A	\$ 8,108	\$8,108	\$ 62,500	0%		
14	Regulatory Compliance	N/A	\$ 366,790	\$366,790	\$ 610,337	60%		
15	General Administration	N/A	\$ 1,111,980	\$1,111,980	\$ 1,111,980	100%	(\$91,529)	Funds shifted from General Administration to Outreach
16	CPUC Energy Division	N/A	\$ 52,496	\$52,496	\$ 77,250	68%		
17								
18	TOTAL Program Costs	N/A	\$ 8,557,557	\$ 8,557,557	\$ 10,085,593	85%		
19								
20	CARE Rate Discount ²	N/A	\$ 208,143,366	\$ 208,143,366	\$ 135,635,133	153%		
21	Service Establishment Charge Discount	N/A	\$ 2,355,195	\$ 2,355,195	\$ 3,948,435	60%		
22								
23	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	N/A	\$ 219,056,118	\$ 219,056,118	\$ 149,669,161	146%	\$ -	

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 2022 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																		
8	January	7,552	1,363	185	9,100	6,845	5,150	6,986	2	18,983	28,083	10309	46,228	37599	94,136	19044	94	805	10,142	30,085	122,219	-2,002	1,093,306	689,876	30,257	1,813,709	1,601,758	113.2%
9	February	5,886	1,275	160	7,321	11,073	6,116	8,082	8	25,279	32,600	9225	42,820	34563	86,608	19501	93	906	12,073	32,573	119,208	27	1,096,210	687,129	30,126	1,813,736	1,601,758	113.2%
10	March	5,731	1,601	153	7,485	7,798	6,111	8,457	4	22,370	29,855	9664	36,992	46587	93,243	18084	108	760	12,722	31,674	123,098	-1,819	1,097,646	684,225	29,778	1,811,917	1,601,758	113.1%
11	April	4,992	1,582	224	6,798	7,038	5,101	7,625	6	19,770	26,568	10975	39,791	44619	95,385	17168	75	748	12,704	30,695	121,953	-4,127	1,096,076	681,660	29,784	1,807,790	1,605,166	112.6%
12	May	3,570	1,405	235	5,210	4,937	4,881	7,038	2	16,858	22,068	12341	20,231	37261	69,833	17254	108	961	10,879	29,202	91,901	-7,134	1,092,809	678,169	29,407	1,800,656	1,605,166	112.2%
13	June	5,111	1,486	268	6,865	4,616	4,014	6,891	1	15,522	22,387	14687	33,861	30294	78,842	20177	60	773	11,625	32,635	101,229	-10,248	1,088,027	673,226	28,888	1,790,408	1,605,166	111.5%
14	July	6,518	1,291	299	8,108	5,710	4,721	7,424	5	17,860	25,968	12356	48,457	15,926	76,739	20023	33	881	12,628	33,565	102,707	-7,597	1,085,444	668,582	28,513	1,782,811	1,606,753	111.0%
15	August	6,067	1,285	235	7,587	6,036	4,845	8,115	6	19,002	26,589	14,265	46,483	16,499	77,247	17417	32	904	13,171	31,524	103,836	-4,935	1,082,982	666,171	28,452	1,777,876	1,606,753	110.7%
16	September	7,535	1,295	371	9,201	5,518	4,007	7,133	9	16,667	25,868	6,183	38,324	16,307	60,814	16346	693	604	10,101	27,744	86,682	-1,876	1,082,617	664,771	28,340	1,776,000	1,606,753	110.5%
17	October	9,842	1,127	286	11,255	5,211	3,522	6,999	4	15,736	26,991	3,996	60,429	13,719	78,144	15,490	19	374	10,796	26,679	105,135	312	1,084,689	663,064	28,287	1,776,312	1,609,992	110.3%
18	November	7,572	1,075	312	8,959	5,236	4,925	6,782	1	16,944	25,903	2,549	28,374	10,766	41,689	16,811	19	239	10,285	27,354	67,592	-1,451	1,085,712	660,553	28,324	1,774,861	1,609,992	110.2%
19	December	5,837	987	288	7,112	6,083	4,329	6,770	1	17,183	24,295	3,497	29,518	11,282	44,297	7,110	11	107	10,123	17,351	68,592	6,944	1,091,445	661,726	28,362	1,781,805	1,609,992	110.7%
20	YTD Total	76,213	15,772	3,016	95,001	76,101	57,722	88,302	49	222,174	317,175	110,047	471,508	315,422	896,977	204,425	1,345	8,062	137,249	351,081	1,214,152	-33,906	1,091,445	661,726	28,362	1,781,805	1,609,992	110.7%
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	⁴ 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 2022 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	1,813,709	2,898	0.16%	1,728	169	1,897	65.46%	0.10%
February	1,813,736	4,203	0.23%	2,582	206	2,788	66.33%	0.15%
March	1,811,917	4,366	0.24%	2,586	232	2,818	64.54%	0.16%
April	1,807,790	1,357	0.08%	665	46	711	52.39%	0.04%
May	1,800,656	1,418	0.08%	656	33	689	48.59%	0.04%
June	1,790,408	1,613	0.09%	693	43	736	45.63%	0.04%
July	1,782,811	1,406	0.08%	600	53	653	46.44%	0.04%
August	1,777,876	1,560	0.09%	762	35	797	51.09%	0.04%
September	1,776,000	1,302	0.07%	508	39	547	42.01%	0.03%
October	1,776,312	1,148	0.06%	0	29	29	2.53%	0.00%
November	1,774,861	1,017	0.06%	0	11	11	1.08%	0.00%
December	1,781,805	1,044	0.06%	0	5	5	0.48%	0.00%
YTD Total	1,781,805	23,332	1.31%	10,780	901	11,681	50.06%	0.66%

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 2022

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

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

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

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

	A	B	C	D	E	F	G
1	PY 2022 CARE Annual Report CARE Table 4 CARE Self-Certification and Self-Recertification Applications ¹ SOUTHERN CALIFORNIA GAS COMPANY						
2							
3							
4							
5		Provided ²	Received	Approved ³	Denied ⁴	Pending/Never Completed ⁵	Duplicates ⁶
6	Total (Y-T-D)	3,150,309	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 2022 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	11,267	8	11,274	13,214	20	13,234	117.3%	264.4%	117.4%
8	Imperial	0	17,900	17,900	2	15,009	15,011	0.0%	83.9%	83.9%
9	Kern	13,521	30,396	43,917	17,950	34,359	52,309	132.8%	113.0%	119.1%
10	Kings	10	12,410	12,420	12	17,118	17,130	117.3%	137.9%	137.9%
11	Los Angeles	811,923	2,363	814,286	882,605	1,808	884,413	108.7%	76.5%	108.6%
12	Orange	191,695	12	191,707	186,555	28	186,583	97.3%	224.9%	97.3%
13	Riverside	91,738	115,403	207,141	108,420	137,510	245,930	118.2%	119.2%	118.7%
14	San Bernardino	154,844	844	155,688	190,834	735	191,569	123.2%	87.1%	123.0%
15	San Luis Obispo	7,744	12,837	20,581	4,058	12,698	16,756	52.4%	98.9%	81.4%
16	Santa Barbara	29,704	979	30,683	33,296	749	34,045	112.1%	76.5%	111.0%
17	Tulare	10,312	38,782	49,094	13,111	55,290	68,401	127.1%	142.6%	139.3%
18	Ventura	53,144	2,157	55,301	54,440	1,984	56,424	102.4%	92.0%	102.0%
19	Total	1,375,901	234,091	1,609,992	1,504,497	277,308	1,781,805	109.3%	118.5%	110.7%
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 2022 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	1,813,709	N/A	1,813,709	1,601,758	113.23%	0.12%	5,694,444
7	February	N/A	1,813,736	N/A	1,813,736	1,601,758	113.23%	0.00%	5,699,822
8	March	N/A	1,811,917	N/A	1,811,917	1,601,758	113.12%	-0.10%	5,703,786
9	April	N/A	1,807,790	N/A	1,807,790	1,605,166	112.62%	-0.23%	5,706,000
10	May	N/A	1,800,656	N/A	1,800,656	1,605,166	112.18%	-0.40%	5,708,988
11	June	N/A	1,790,408	N/A	1,790,408	1,605,166	111.54%	-0.57%	5,710,421
12	July	N/A	1,782,811	N/A	1,782,811	1,606,753	110.96%	-0.43%	5,711,246
13	August	N/A	1,777,876	N/A	1,777,876	1,606,753	110.65%	-0.28%	5,716,030
14	September	N/A	1,776,000	N/A	1,776,000	1,606,753	110.53%	-0.11%	5,719,040
15	October	N/A	1,776,312	N/A	1,776,312	1,609,992	110.33%	0.02%	5,722,418
16	November	N/A	1,774,861	N/A	1,774,861	1,609,992	110.24%	-0.08%	5,726,094
17	December	N/A	1,781,805	N/A	1,781,805	1,609,992	110.67%	0.39%	5,730,165
18	¹ Explain any monthly variance of 5% or more in the number of participants. ² The SoCalGas population did not vary by a level of 5% or more in any month during 2022.								
19									
20									

	A	B	C	D
1	PY 2022 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	22.29	12.10	34.39
10	CARE	18.76	7.59	26.35
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	\$64.38	N/A	
22	CARE	\$48.89	N/A	
23				
24	¹ Excludes master-meter usage.			

¹ Excludes master-meter usage.

	A	B	C	D	E	F
1	PY 2022 CARE Annual Report CARE Table 10 CARE Surcharge & Revenue SOUTHERN CALIFORNIA GAS COMPANY					
2						
3						
4						
5						
6						
7	ELECTRIC CARE Surcharge and Revenue Collected by Customer Class					
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	GAS CARE Surcharge and Revenue Collected by Customer Class					
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	\$1.90	\$64.37	2.95%	\$89,837,375	42.11%
22	Commercial	\$24.31	\$510.09	4.77%	\$54,597,827	25.59%
23	Natural Gas Vehicle	\$1,685.90	\$19,602.38	8.60%	\$9,471,408	4.44%
24	Industrial	\$324.24	\$1,917.58	16.91%	\$59,446,480	27.86%
25						
26						

¹ Excludes CARE customers.

	A	B	C	D	E	F
1	PY 2022 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	2	2	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	Hernandad Mexicana	0	0	0	0	0
24	CSET	0	0	0	0	0
25	Crest Forest Family Cmty	0	0	0	0	0
26	Campesinos 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	47	47	0	0	0
33	Visalia Emergency Aid Council	0	0	0	0	0
34	Total	49	49	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 2022 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5							
6	Participating Facilities by Month						
7	2022	Gas			Electric		
8		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
9	January	205	1,131	1,336	N/A	N/A	N/A
10	February	205	1,130	1,335	N/A	N/A	N/A
11	March	205	1,126	1,331	N/A	N/A	N/A
12	April	205	1,128	1,333	N/A	N/A	N/A
13	May	205	1,126	1,331	N/A	N/A	N/A
14	June	205	1,105	1,310	N/A	N/A	N/A
15	July	205	1,126	1,331	N/A	N/A	N/A
16	August	205	1,126	1,331	N/A	N/A	N/A
17	September	205	1,127	1,332	N/A	N/A	N/A
18	October	205	1,128	1,333	N/A	N/A	N/A
19	November	205	1,141	1,346	N/A	N/A	N/A
20	December	205	1,149	1,354	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	26.22	N/A				
27	Commercial Facilities	206.56	N/A				
28							
29							
30	CARE Expansion Self-Certification and Self-Recertification Applications						
31		Received	Approved	Denied	Pending/Never Completed	Duplicates	
32	Total	752	732	0	15	5	
33	Percentage		97.3%	0.0%	2.0%	0.7%	
34							
35	¹ Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2022 CARE Annual Report									
2	CARE Table 13									
3	CARE High Usage Verification Results ⁵									
4	SOUTHERN CALIFORNIA GAS COMPANY									
5	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
6	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
7	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
8										
9	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
10	² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
11	³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
13	⁵ High usage is defined as a customer that exceeds 400% or 600% of baseline.									

PY 2022 CARE Annual Report CARE Table 13A CARE Customer Usage and ESA Program Treatment								
# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV ¹	Percent of those CARE customers Not served by ESA Program ²	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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

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

	A	B
1	PY 2022 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	69
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	57,974
8	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	8,885
9	Head Start Income Eligible - (Tribal Only)	275
10	Healthy Families A&B	17,475
11	Low-income Home Energy Assistance Program (LIHEAP)	9,653
12	Medicaid/Medi-Cal	90,668
13	National School Lunch Program (NSLP) - Free Lunch	14,202
14	Supplemental Security Income (SSI)	9,822
15	Tribal TANF ²	0
16	Women, Infants, and Children Program (WIC)	17,036
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		

PY 2022 CARE Annual Report
CARE Table 15
CARE and Disadvantage Communities Enrollment Rate for Zip Codes
SOUTHERN CALIFORNIA GAS COMPANY

Total CARE Households Enrolled				
Month	CARE Enrollment Rate for ZIP Codes that have 10% or more disconnections	CARE Enrollment Rate for ZIP Codes in High Poverty (Income Less than 100% FPG)	CARE Enrollment Rate for ZIP Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (ZIP/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January	N/A	N/A	N/A	N/A
February	N/A	N/A	N/A	N/A
March	N/A	N/A	N/A	N/A
April	N/A	N/A	N/A	N/A
May	N/A	N/A	N/A	N/A
June	N/A	N/A	N/A	N/A
July		94.5%	50.6%	65.2%
August		95.0%	46.7%	64.7%
September		93.1%	46.3%	63.9%
October		94.1%	50.2%	63.5%
November		94.9%	48.9%	62.4%
December		95.3%	48.6%	64.8%
YTD		94.5%	48.6%	64.1%

Note:

Data collection began in July 2022.

Penetration Rate and Enrollment Rate are the same value.

DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.

**SOCALGAS
[PUBLIC VERSION]**

APPENDIX A

**SECTION 6.3
Tribal Outreach Contacts**

Confidential and Protected Materials Pursuant to Non-Disclosure, PUC Section 583, D.21-09-020 and GO 66-D (Rev 2

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 CARES/Customer Assistance Outreach												
Agua Caliente Band of Cahuilla Indians of the Agua Caliente Indian Reservation, California										https://www.aguacaliente.org/	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.
Chumash / Apanish Foundation											Santa Barbara	
Fernandeño Tataviam Band of Mission Indians (FTBMI)										https://www.tataviam-nsn.us/	Los Angeles	
Fernandeño Tataviam Band of Mission Indians (FTBMI)										https://www.tataviam-nsn.us/	Los Angeles	
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	
Gabrieleño Tongva San Gabriel Band of Mission Indians										https://www.gabrieleno-nsn.us/	Los Angeles	
Gabrieleño Tongva San Gabriel Band of Mission Indians										https://www.gabrieleno-nsn.us/	Los Angeles	
Juaneño Band of Mission Indians, Acajachemen Nation											Orange	
Morongo Band of Cahuilla Mission Indians, California										www.morongonation.org	Riverside	Tribal land receives service.
Pechanga Band of Luiseno Mission Indians of the Pechanga Reservation, California										http://www.pechanga-nsn.gov	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. 6 TANF Offices in SoCalGas Service Territory

Tule River Indian Tribe of the Tule River Reservation, California		http://www.ovcdc.com/tule-river/	Riverside	The reservation does not receive service.
Tule River Indian Tribe of the Tule River Reservation, California		http://www.ovcdc.com/tule-river/	Riverside	The reservation does not receive service.
Tule River Indian Tribe of the Tule River Reservation, California		http://www.tulerivertribe-nsn.gov	Fresno	The reservation does not receive service.
Twenty-Nine Palms Band of Mission Indians of California		http://29palmstribes.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
Bravo Foundation			Los Angeles and Riverside Counties	Serves the population of Native Americans located in Southern California underserved communities of Central American origins such as the Lenka, Pipil, Maya, Aztecs, Pokoman, Xincas. Additionally, the organization has extensive experience working with underprivileged Native children, disabled persons, seniors, at-risk youth, and other special needs groups. The organization aims to provide several services, including a safe space, job training, specialty foods and other resources from trusted grassroots community organizations. Bravo Foundation does not only provide resources but also aims to address other diverse service needs impacting identity and wellness experienced by Native communities while also incorporating Central and South American indigenous cultural perspectives Connect individuals with resources for their personal well-being, including counseling, foodbank accessibility, legal services, protective services, and educational services. In terms of cultural services, the organization serves as Native cultural community liaisons and provides Indigenous Cultural Service Consultants with Central American Consulate Generals.
California Nations Indian Gaming Association (CNIGA)		www.cniga.com	Statewide	N/A
California Nations Indian Gaming Association (CNIGA)		www.cniga.com	Statewide	N/A
Casa de la Cultura Maya			Los Angeles	
Indigenous Women Rising			Orange and Riverside Counties	The organization was founded in 2017 and serves the Native American population in Orange County. The organization aims to provide a safe space and resources from trusted grassroots community organizations. Indigenous Women Rising Orange County not only provides resources to address different service needs that indigenous women may need, but incorporates Native American cultural perspectives and puts together events that
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
United American Indian Involvement		uaai.org		