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)	Application 19-11-003 (Filed November 4, 2019)
And Related Matters.	Application 19-11-004 Application 19-11-005 Application 19-11-006 Application 19-11-007

AMENDED ANNUAL REPORT OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR PROGRAM YEAR 2023, THROUGH DECEMBER 31, 2023

[PUBLIC VERSION]

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Date: June 13, 2024

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[PUBLIC VERSION]

This report presents the amended 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) 2023. 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. Amended content throughout the report is noted in red font and underlined.

Respectfully submitted on behalf of
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Date: June 13, 2024

Energy Savings Assistance Program

and

California Alternate Rates for Energy Program

Annual Report

2023 Amended Results

June 13, 2024

ESA PROGRAM AND CARE ANNUAL REPORT

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ENERGY SAVINGS ASSISTANCE (ESA) PROGRAM ANNUAL REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

SoCalGas's 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 amended annual report presents the total achievements and expenditures for SoCalGas's ESA Program for Program Year (PY) 2023. It should be noted as part of an effort to support the main ESA Program contractor network to spend all allocated funds, SoCalGas implemented a PY2023 committed funding[1] process to allow main ESA Program contractors to complete and invoice PY2023 open work by March 31, 2024. The committed funds period occurred from January 1, 2024, through March 31, 2024, and the final 2023 results, including expenditures, homes treated, and energy savings from the committed funds period are reflected in this amended report.

PY2023 served as a transition year for SoCalGas's ESA Program and its contractor network, adhering to the directives outlined in Decision (D.) 21-06-015. The driving force of the program changed from a model focusing on treating all eligible and willing

[1] A.19-11-003 et al-Joint IOUs ESA Midcycle Progress Report Appendix B states, "Committed Funds: For the low-income programs, the term 'committed funds' is defined as funds that are committed to a specific California Alternate Rates for Energy (CARE) Program/ESA Program contract or customer project. Committed funds are not considered 'unspent funds' and need not be spent during that particular program cycle so long as there is an expectation that the activities will be completed and that the committed funds are spent to complete the activities for which they were committed."

customers[2] to a new design focused on multiple objectives including achieving deeper energy savings, lowering bills, balancing cost effectiveness, and continuing to provide health, comfort and safety measures to customers. These multiple, and sometimes conflicting, objectives created a challenging landscape for SoCalGas in PY2023.
In addition, SoCalGas worked to execute significant changes in program delivery outlined in D.21-06-015. SoCalGas established the Southern Multifamily Whole Building (MFWB) program, collaborating with MFWB lead San Diego Gas and Electric (SDG&E). Furthermore, SoCalGas enacted its Pilot Plus/Deep (also referred to as ESA Whole Home), working with pilot lead Southern California Edison (SCE).

SoCalGas also worked with the other California Investor-Owned Utilities (IOUs) as well as other stakeholders in PY2023 by participating in the ESA Program Working Group (ESA WG) and Sub-working Groups (SWG), and collectively produced the Midcycle Progress Report in December 2023. This comprehensive report provides insights on energy-savings goals, best practices, pilots, and cost-effectiveness levels under new guidance thresholds. The report outlined programmatic challenges, accomplishments, best practices, and provided suggestions for the second half of the 2021-2026 program cycle and beyond.

Moving forward, SoCalGas is optimistic that the program is making strides in the right direction. To support the transition towards deeper energy savings, SoCalGas has

[2] D.07-12-051 established the ESA Programs "programmatic initiative" with the goal of providing all eligible customers the opportunity to participate in the low-income energy efficiency program.

implemented, and continues to incorporate, a myriad of solutions and has seen positive results. Elements from the new program design have been reflected in many different facets of the program including modifications and inclusion of key performance indicators to help guide contractors toward achieve deeper therm savings. Revisions to contract/financial terms allowed alignment with energy savings objectives and awarding of contractor compensation incentives combined with enhanced marketing efforts provided additional assistance to SoCalGas's contractor network. Furthermore, contractors received monthly assessment reports, including therms saved and average cost per therm saved. The savings were provided in total and at the measure level. This helped create a roadmap for the SoCalGas contractor network to follow, contributing to substantial improvement in several areas in 2023.

The significant programmatic improvements outlined above resulted in proportional changes in energy savings overall, especially in the main ESA Program. While the MFWB implementer ramped up in 2023, that program was not able to provide any therm savings contributions. However, SoCalGas the main ESA Program built upon its 2022 ramp up year, to transition to a proportionally more efficient and effective program in 2023. Therm savings increased from an average of 6 therms per home in 2022[3] to over 20 therms per home in 2023,[4] a nearly 242% increase.

[3] Derived from 2022 Low Income Annual Report Table 2 data. Total Therms Annual/ Number of Homes Treated = 105,067/632,019 = 6.015 therms saved per home.

[4] Derived from 2022 Low Income Annual Report Table 2 data. Total Therms Annual/ Number of Homes Treated = 1,149,176/56,058 = 20.49 therms saved per home.

Not only did SoCalGas save significantly more therms in 2023, but it also spent considerably less per treatment to achieve those savings. Through the committed funds period[5], SoCalGas treated 56,058 homes and spent $79.54 million, resulting in spending approximately $1,419 per home in the main ESA Program. With a savings of over 20 therms per home in 2023, the main ESA Program spent $69.21 per therm saved in 2023.[6] Comparatively, in 2022,[7] the main ESA Program spent $93.65 million overall, spending an average of $148.55 per therm saved. That is an efficiency increase (dollars per therm saved) of 53.4% from the previous year.[8] These considerable improvements in therm savings performance and budget efficiency are evidence that SoCalGas is headed in the right direction to reach the energy savings goals outlined in D.21-06-015.

1.1 Energy Savings Assistance Program Overview

PY2023 began with a smaller network of 13 weatherization contractors (down from 25 in 2022) implementing SoCalGas's ESA Program with agreements and compensation restructured to align with the new focus on achieving deeper therm savings.[9] All existing program measures were retained, and two (2) new high therm saving measures were added which increased the value to the program's portfolio mix. New measures included tankless water heaters and smart fan controllers. All measures continued to be verified as

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[5] Final results, including from the committed funds period of January 1 – March 31, 2024 are reflected in this amended report.
[6] Derived from Table 2 data.
[7] Derived from 2022 Low-Income Annual Report Table 2.
[8] 2022 LI Annual Report Table 2.
[9] After completing main ESA Program Request for Qualifications (RFQ) and Request for Proposal (RFP) processes with numerous bidders, a total of 14 successful bidders moved onto the negotiation phase in 2022. SoCalGas completed negotiations with 13 main ESA Program contractors with a contract effective date of January 1, 2023.

feasible as well as evaluated for energy savings potential through the outreach, assessment, and installation processes.

Additionally, to emphasize the need for increased energy savings, the Decision directed the IOUs to use a portfolio-level cost-effectiveness of 0.7 Energy Savings Assistance Program Cost Effectiveness Test (ESACET) as a guideline and to re-evaluate all measures to determine if those measures with ESACET scores of less than 0.30 should be removed from the portfolio (with limited exception given to HCS measures.)[10] This was the main consideration in deciding which measures were included in SoCalGas's portfolio mix in 2023.

SoCalGas provided the following measures and services to homes:

- In-home energy education
- High efficiency (HE) 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
  - Tankless water heater (new measure)
- Enclosure measures including:
  - Envelope and air sealing measures
  - Attic insulation improvements
- Heating measures including:
  - Furnace repair/replacement
  - Duct sealing weatherization
  - Smart thermostats
  - Smart fan controller (new measure)
- Maintenance measure
  - Furnace clean and tune

[10] D.21-06-015, OP 83.

SoCalGas provided and/or serviced 42,223 total appliances,[11] including 36,157 water heaters, 5,281 furnaces and 785 High Efficiency (HE) clothes washers. The average per home lifecycle bill savings for the PY2023 ESA Program was $275. This represents a nearly 325% increase from the lifecycle bill savings of $64.75 achieved in 2022.

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

2023 Main ESA Program Summary[12]			
	Authorized Budget/ Planning Assumptions*	**Actual**	**%**
Budget	$94,836,845	$79,536,635	84%
Administrative Costs[13]	$11,999,125	$10,621,286	89%
Homes Treated	69,837	56,058	80%
Therms Saved (% of portfolio goal)	1,435,220**	1,149,176	80%
Therms Saved (% of main ESA allocation)	1,246,726***	1,149,176	92%
GHG Emissions Reduced (Tons)****	7,345	6,080	83%

* Authorized funding and homes treated goals per D.21-06-015.
** Per D.21-06-015, authorized therms saved goal of 1,435,220 is for the *entire* ESA Program portfolio, including main ESA Program (SF), Multifamily (MF) in-unit, MF Common Area Measures (CAM) and Multifamily 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 74,631 therm savings contributions from MF CAM. See next table, "Program Summary for 2023 ESA Program MF CAM".
*** Portion of the portfolio therm savings goal allocated to the main ESA Program.
**** GHG Emissions Reduced calculated using EPA Greenhouse Gas Equivalencies Calculator.

[11] Total appliances measures can be found on Table 2. The categories and measures included are *Appliances*: HE clothes washer, *Domestic Hot Water*: water heater tank and pipe insulation, water heater repair/replacement, tankless water heater, *HVAC*: furnace repair/replacement, HE FAU – early replacement, HE FAU – on burnout, *Maintenance*: furnace clean and tune.
[12] D.21-06-015 permits IOUs to use committed funding for work started in 2023 but finished in 2024. SoCalGas allowed its main ESA Program contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended main ESA Program results, including the committed funds period, are included in this report.
[13] 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 2023, SoCalGas administered the ESA Program within the cost parameters outlined in D.21-06-015[14] in the second full year of the 2021-2026 program cycle, spending 84% of its authorized budget. Actual spending of approximately $10.6 million on administrative-related costs in 2023 was within the authorized budget levels for each cost category, but as of this date exceeded the 11% measurement for 2023.[15] This outcome was impacted by the delay of launching and ramp up time needed by the statewide Program Administrator for the Southern ESA Program MFWB program, which resulted in only spending 3.6% of the $21.5 million budget in 2023. However, as the MFWB program can shift costs between program years, SoCalGas anticipates returning within administrative cost thresholds during the program period as additional customer enrollments and installations are finalized and billed to SoCalGas.

The main ESA Program treated a total of 56,058 homes and saved a total of 1,149,176 therms. This accounted for 80% of the total portfolio annual them savings goal, and 92% of the therm savings goal allocated to the main ESA Program. PY2023 reporting was extended to March 31, 2024, as part of the committed funding process, and the final 2023 expenditures, homes treated, and therms saved through the committed funds period are reflected in this amended report.

[14] *See* D.21-06-0-15, Attachment 1 Table 10: ESA Program Approved Budgets (SoCalGas).
[15] 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 per D.21-06-015 OP 112.

SoCalGas also tracked its program delivery experiences via a quarterly customer satisfaction survey in 2023. In PY2023, 41% of customers rated the *overall quality of service* they received from the SoCalGas ESA Program as "excellent." The key service quality indicator that ranked the highest for SoCalGas was *quality of inspection* where 60% of customers rated SoCalGas "excellent."[16]

The survey design helps SoCalGas examine its performance relative to quality of service, enrollment, installation (service and quality of materials), and inspection visits. These customized evaluations were used to help ESA Program management understand effectiveness of the program and identify potential areas for improvement.

2023 ESA Program MF CAM Summary			
	Authorized Budget/ Planning Assumptions [1]	**Actual**	**%**
Budget*	$8,001,130	$4,008,225***	50%
Administrative Costs[17]	$800,113	$130,772	16%
Properties Treated	N/A	18	N/A
Therms Saved	N/A**	74,631	N/A
GHG Emissions Reduced (Tons)	N/A	395	N/A

* Authorized budget from unspent, uncommitted funds per AL 5865 filed September 17, 2021
**Therms saved goal is at portfolio level.
***Lagging invoice received in 2024 for 2023 work. This closes out the MFCAM program.

[16] Customers provide ratings for each attribute on a scale consisting of "Excellent," "Very Good," "Good," "Fair" and "Poor."
[17] 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.

SoCalGas completed 18 Multifamily Common Area Measure (MF CAM) projects in 2023. The projects focus on replacing central system domestic space and water heating equipment (e.g., boilers and water heaters). SoCalGas committed to completing all projects enrolled prior to June 30, 2023, at which time remaining projects were transitioned to the Southern MFWB program beginning on July 1, 2023.

2023 MFWB Southern Program Summary SoCalGas[18]			
	Authorized Budget/ Planning Assumptions*	**Actual**	**%**
Budget	$21,477,314	$770,705**	3.6%
Administrative Costs	$2,147,731	$148,883	7%
Multifamily Properties Treated	42	0	0%
Multifamily Tenant Units w/in Properties Treated	7,090	0	0%
kWh Saved	N/A	N/A	N/A
Therms Saved	205,081	0	0%
GHG Emissions Reduced (Tons)	1,085	0	0%

* Per D.21-06-015
** Provided by SDG&E. Measure costs include expenses not recorded by SoCalGas in SAP.

2023 MFWB Southern Program Aggregate Summary			
	Authorized Budget/ Planning Assumptions*	**Actual****	**%**
Budget	$38,602,083	$1,499,331	3.9%
Administrative Costs	$3,860,208	$1,006,282	26%
Multifamily Properties Treated	87	0	0%
Multifamily Tenant Units w/in Properties Treated	15,595	0	0%
kWh Saved	3,916,471	0	0%
Therms Saved	227,457	0	0%
GHG Emissions Reduced (Tons)	1,203	0	0%

* Per D.21-06-015
** Provided by SDG&E. Includes expenses not recorded by SoCalGas in SAP.

[18] The Southern MFWB program was open for customer enrollment on July 1, 2023.

D.21-06-015 directed SDG&E to lead the southern IOUs (SDG&E, SCE and SoCalGas) in implementing a third-party Southern MFWB program selected through a competitive solicitation process. The Southern MFWB program provides energy efficiency (EE) services to multifamily (MF) customers, including in-unit and common area measures, for a holistic approach to treating the whole building. Richard Heath & Associates (RHA), the selected implementer of the program received their Notice to Proceed (NTP) letter on December 30, 2022, with an effective date of January 1, 2023. The Southern MFWB program opened for customer enrollment on July 1, 2023, across all three service territories. The program began operations using a network of existing ESA Program contractors and trade allies. It also benefited from a substantial customer waitlist from the legacy MF CAM program. Throughout the 2023 program year, the Southern MFWB program completed 69 whole building enrollments (SDG&E 12, SCE 1, SoCalGas 21, SCE and SoCalGas combined 35), 38 property assessments, and began the installation of basic measures for in-unit treatments. The southern IOUs collaborated with RHA to establish a strong pipeline of 745 property leads. Additionally, both in-unit and CAM customers who were not enrolled by June 30, 2023, under the existing programs, were transitioned to the Southern MFWB implementer for enrollment. Despite these activities and actions, no installations were completed in 2023. Several factors impacted the program's start and production for PY2023.

- ESA Program Subcontractor Adjustment: One of the major challenges is related to the adjustment of ESA Program subcontractors to the new program structure and pricing, specifically, the compensation holdback that is tied to performance. SDG&E and its implementer are actively

working with the subcontractors to facilitate a smooth transition and promote alignment with the program goals.

- Resident-Driven Treatments: The MFWB program was designed to acquire customers through two (2) pathways: 1) property owners and managers of multifamily properties and 2) individual income-qualified residents of multifamily properties. Because the program's compensation model was designed for the efficiencies inherent in property-level enrollment, subcontractors found it infeasible to treat individual standalone units. To serve these residents, the MFWB program has pivoted to work with property owner/managers to turn resident leads into property-wide treatment.

- Tenant Income Documentation: Some property owners have policies that restrict providing proof of tenant income documentation at the unit level due to confidentiality and privacy concerns. The implementer is actively engaging with property owners, addressing their concerns, and working to establish acceptable income documentation practices.

Additionally, SDG&E aimed to integrate and streamline information systems in the Southern region using its Energy Efficiency Collaboration Platform (EECP) as the main system of record for the Southern MFWB program. The primary goal was to create a more efficient and accessible platform for validating customer data. However, the project faced several challenges that impeded the smooth integration of this system and required changes in approach.

- Complex System Integration: The foremost challenge encountered by the southern IOUs was the complexity of integrating individual IOU information systems. Each IOU had its own systems, leading to variations in data formats, structures, and processes.

- New MFWB System: To address the challenges stemming from the program's complexity, SDG&E turned to its implementer, RHA, for the development of a new system, leveraging their in-house software, RHA Industries. This software streamlined the intake process, enabling tablet-based enrollment, a paperless approach, and the capture of on-site equipment images for utilization in SDG&E's quality assurance plan.

While the initial vision sought efficiency gains through the utilization of SDG&E's EECP system, the decision to incorporate the implementer's third-party

software resulted in significant operational improvements. This, combined with SDG&E's EECP as the primary system of record responsible for invoicing and reporting program activities across the three southern IOUs, has proven effective. Although individual validation by the implementer may not represent the ideal solution, the southern IOUs are actively engaged in addressing and overcoming challenges arising from this approach collaboratively. The tables above provide a summary outlining SoCalGas's portion of the 2023 program activity, as well as aggregated results.

2023 ESA Program Pilot Plus/Deep Summary SoCalGas			
	Authorized Budget/ Planning Assumptions*	**Actual**	**%**
Budget	$6,510,545	$567,134**	8.5%
Administrative Costs[19]	$651,054	$13,123	2%
Homes Treated	60	2	3%
kWh Saved (Plus = 1-15 Percent)	N/A	N/A	N/A
kWh Saved (Deep = 15-50 Percent)	N/A	N/A	N/A
kW Demand Reduced	N/A		N/A
Therms Saved (Plus = 5-15 Percent	N/A	0	N/A
Therms Saved (Deep = 15-50 Percent	N/A	249	N/A
GHG Emissions Reduced (Tons)	N/A	1.3	N/A

* Per D.21-06-015.

** Provided by SCE. Includes expenses not recorded by SoCalGas in SAP.

[19] 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.

2023 ESA Program Pilot Plus/Deep Summary SoCalGas and SCE			
	Authorized Budget/ Planning Assumptions*	**Actual****	**%**
Budget	$10,395,409	$1,186,486	11%
Administrative Costs[20]	$1,039,541	$78,582	8%
Homes Treated	60	2	3%
kWh Saved (Plus = 1-15 Percent)	N/A	0	N/A
kWh Saved (Deep = 15-50 Percent)	N/A	1,235	N/A
kW Demand Reduced	N/A	253	N/A
Therms Saved (Plus = 5-15 Percent	N/A	0	N/A
Therms Saved (Deep = 15-50 Percent	N/A	249	N/A
GHG Emissions Reduced (Tons)	N/A	1.3	N/A

* Per D.21-06-015

** Provided by SCE. Includes expenses not recorded by SoCalGas in SAP.

In D.21.06.15, the Commission granted approval for a pilot-based redesign concept of the ESA Program based on recommendations provided by the CPUC's Energy Division (ED). The newly designed pilot program known as ESA Pilot Plus/Deep (PP/D) or ESA Whole Home (ESA WH), is a joint pilot with SCE and SoCalGas. The pilot targets CARE high-usage customers who reside in specific counties within SCE and SoCalGas's common service territories. In late 2022, Maroma Energy Services was selected to be the implementer and Illume was selected to be the evaluator for ESA WH.

ESA WH began to take shape in 2023 with enrollment and assessment appointments commencing in the fourth week of May. Furthermore, ESA

[20] *Id*.

WH reached a milestone, completing its first two homes treated in 2023. Additionally, (not included in the table above), there were 3 customers in the installation phase, 12 customers in the application phase, and 34 customers who expressed interest in the program by the end of 2023. The average cost per treated home in 2023 totaled $17,099.[21]

More information regarding ESA WH can be found in Sections 1.2.2 and 1.9.1 of this annual report.

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, in its transition from prioritizing homes treated to therm savings, continues its dedication to fostering program awareness and eliminating participation barriers such as trust and recognition gaps. Ongoing marketing communications are designed to help build necessary awareness and encourage customers to actively engage with and participate in the program. Targeting current CARE customers who had not been recently treated by the program in the areas with the lowest program enrollment, SoCalGas deployed a multichannel approach using direct mail, emails, and text messages. Using existing CARE participation, the goal is to prompt customers to explore the ESA Program,

[21] Page 128 of D.21-06-015 states, "We expect and understand that the Pilot Plus and Pilot Deep treatments will require a greater investment per household…". In this case with only 2 treatments and a high cost per treatment (solar water heater with tankless back up measure is $8,280 alone) resulted in a high average cost per treatment. See ESA Table 2C in the attachments for measure cost breakdown.

leveraging their familiarity with a well-known and trusted SoCalGas program. The direct-mail letters and emails offered a program overview, detailed eligibility criteria, and encouraged customers to visit the program web page to learn more and apply. Text messages emphasized the potential for no-cost home improvements by professional contractors and directed customers to the program's website (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 2023, SoCalGas reached out to approximately 349,886 CARE customers through direct-mail letters, 310,214 via emails and 318,222 through text messages. The ESA Program's impressive email open rate of 56.4% and an average click-through rate (CTR) of 6.0% underscore continued customer interest and engagement, surpassing benchmarks across all industries.[22]

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

All of the customers in the ESA WH targeted customer sample, which the evaluation team randomly assigned to annual sample groups, are stratified by region and electric usage quartile. Eligible customer criteria includes:

- Reside in one of the three (3) eligible counties (Los Angeles, Riverside, or San Bernardino),
- CARE enrolled,
- Not an ESA Program participant since 1/21/21 or have not installed a high-impact measure (central air conditioner or central heat pump) through SCE's ESA Program since 2016, and

[22] Questline Digital (2023), 2023 Energy Utility Benchmark Report.

- Exceeded 300% of baseline electricity usage at least once and exceeded 200% of baseline natural gas usage at least once from September 2021 through October 2022.

SoCalGas and SCE initially planned to segment customers based on demographic, location, financial, and health criteria, using that information to prioritize customers into three (3) groups, 1) high priority groups with highest needs, 2) medium priority, and 3) low priority.

Based on prioritization criteria and analysis detailed in the Pilot Implementation Plan (PIP), SoCalGas and SCE expected to have 5,504 matched dual-fuel high-electric and high-gas usage customers eligible for the pilot. However, through improvements in the process for matching electric and natural gas customers, the utilities jointly decided to include 15,915 customers in the full targeted customer list to achieve the goal of serving 2,200 customers. The final approach broadened the target customer base to be more inclusive to account for initial low interest.

More information regarding ESA Whole Home can be found in Sections 1.1.1 and 1.9.1 of this annual report.

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 program outreach.

In PY2023, SoCalGas strategically targeted current CARE customers in areas with low program enrollment. The program concentrated efforts in broader geographical zones, aligning with program needs and customer characteristics, as

part of the new program cycle initiatives. Specifically, SoCalGas prioritized customers with year-round high energy usage, who fall within the 200-250% Federal Poverty Guidelines (FPG), identified using CARE as a proxy, or reside in ZIP codes likely to have high eligibility percentage and low penetration rates. This approach enabled focused outreach to underserved areas across the entire SoCalGas 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.

In 2023, SoCalGas's ESA Program continued implementing strategies aimed at achieving deeper energy savings as described below. The refined approach across Marketing and Outreach (M&O), Enrollment and Assessment (E&A), and Operations aimed to achieve more profound energy savings while maintaining program effectiveness. Evidence this approach was successful is demonstrated by the therm savings increase from an average of 6 therms per home in 2022 to over 20 therms per home in 2023, a nearly 242% increase.

Marketing and Outreach

Yearly ESA Program Paid Media Campaign

SoCalGas did not launch a paid media effort for the ESA Program in 2023.

Email Optimization

To bolster ESA Program participation, SoCalGas continued personalized email outreach efforts targeting potentially eligible customers in 2023. These efforts specifically focused on high natural gas usage customers throughout the SoCalGas service territory, identified either by income - ranging from 200% - 250% of FPG, or by ZIP codes with a high likelihood of eligibility and low enrollment rates. Similar to previous years, the ESA Program email campaigns maintained high performance, with an average open rate of 56.4% and an average CTR of 6.0%, indicating strong interest and engagement among the targeted audience.

Texting Potentially Eligible Customers

During 2023, SoCalGas continued its text message campaign aimed at potentially eligible customers to raise awareness about the ESA Program. Specifically, text messages were tailored for current CARE customers situated in ZIP codes with the lowest program enrollment who were likely to have a high percentage of eligibility. This targeted outreach reached approximately 318,222 customers, emphasizing the opportunity for qualifying home improvements by professional contractors at no cost. Recipients were encouraged to explore further details through the program's dedicated website (socalgas.com/Improvements).

ESA Program Webpage Alignment

Throughout 2023, SoCalGas diligently maintained the ESA Program webpage,

ensuring customers had access to the latest information. Demonstrating this commitment, SoCalGas enhances the ESA Program webpage by providing clear and consistent messaging regarding the program and its processes. The webpage will undergo further updates as the program progresses, incorporating new information and supportive tools such as videos and an updated online platform to serve our customers better.

ESA Program Social Media Posts

In 2023, SoCalGas revamped its social media strategy, transitioning from monthly postings to a more targeted approach aligned with home improvement sales days opportunities. This strategic shift allows for better analytics and more effective outreach. Working with an ad agency, SoCalGas launched ESA Program social media posts on Meta sites (Facebook and Instagram) throughout 2023. These posts reached approximately 10.8 million unique viewers, generating 6,581 link clicks across general and Hispanic/Latino markets. The optimization focused on raising program awareness rather than clicks, reflecting a shift towards broader outreach.

Additional ESA Program Bill Communications

In 2023, SoCalGas strategically promoted the ESA Program through various bill communications targeted at residential CARE customers. ESA Program bill messages were dispatched in February, July, and November, maximizing outreach opportunities. Unlike bill inserts, bill messages printed directly on mailed bills

provided a cost-effective means to engage targeted customers, with approximately 2.5 million total residential CARE customers receiving these messages. Additionally, SoCalGas utilized bill envelope messages in May, August, and September to promote the ESA Program, directing all residential customers with paper billing in those months – totaling approximately 6.7 million – to the ESA Program webpage for further information. Notably, the ESA Program received a dedicated promotion through a bill insert in December, enhancing visibility and awareness to approximately 837,500 CARE customers. Moreover, general promotion of all Customer Assistance Programs (CAP), including the ESA Program, was carried out in February and March, reaching over 4.5 million residential customers with paper billing. SoCalGas remains committed to leveraging bill communications effectively to promote the ESA Program and other assistance initiatives to relevant audiences in 2024.

Enrollment and Assessment (E&A)

Initial E&A contractor training focused on covering utility-specific items related to policies, eligibility documentation requirements, overall customer service standards, and practices aimed at leveraging opportunities with other IOUs' low-income programs, like Low Income Home Energy Assistance Program (LIHEAP), Family Electric Rate Assistance (FERA), Medical Baseline Allowance (MBL) and SCE's One-time bill assistance. Additional contractor personnel training curriculum, such as that for telemarketers and canvassers, is provided to contractors enabling them to facilitate their own training.

Telemarketers are not required to have an active Home Improvement Salesperson Registration (HISR) and are therefore not issued a SoCalGas badge upon completion of training, whereas upon completion of their training, canvassers in the field 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 2023, SoCalGas continued transitioning away from focusing on the number of homes treated and first-time home enrollments, directing contractors to focus on homes with the potential for achieving higher therm savings. This approach was facilitated by a continued focus on the installation of measures that provide high therm savings and on homes with the opportunity for the installations of these measures, like homes with attics (with potential for attic insulation).

ESA Mobile[23] Agreement PDF – Additional Documents

SoCalGas continued its practice of delivering 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. Contractors continue to be encouraged to collect or verify the correct email address from every applicant where the application documentation would

[23] 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.

be delivered. In addition, ESA Mobile was enabled to determine if the Primary Language field collected during the enrollment process matched one of the seven (7) languages to which the EE Guide is available. If the value in the Primary Language field matched one of these translated languages, the corresponding in-language EE Guide is sent electronically. If not, the English/Spanish version of the EE Guide is provided.

Language Barriers

Another strategy SoCalGas continued to utilize in 2023 to address language barriers at all stages of program implementation was the integration of a dedicated language translation line service 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 improve the delivery of program information and energy education included the continued use of the EE Guide previously translated into six (6) 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, continued being delivered electronically to customers whose primary language matched one of the EE Guide translated languages. Having the EE Guide online also enabled

customers requiring larger print to 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 Disadvantaged Communities (DACs), Hard-to-Reach (HTR), Tribal, Disabled, 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 may demonstrate higher therm savings potential.

- Contact Lists created by contractors in Home Energy Assistance Tracker (HEAT)[24] 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 (known as simple measures) during the first visit allows the home to begin receiving the benefit of energy savings even if the customer ultimately does not

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

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 natural 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.

- SoCalGas also provides a monthly report which contains average therms saved and average costs per therm saved to the contractor network. The report provides this detail in total and at the measure level, as well as the percentage of the contractor's therm savings goal relative to other contractors. The latter helps provide context for our contractor network as to how well they are performing relative other contractors in the program.[25] The report is cumulative so the contractor can track their progress towards meeting their therm savings goal for the year.

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 2023, SoCalGas continued working with a Tribal Consultant to assist in meeting D.21-06-015 directives for Tribal outreach by coordinating meetings with Tribal leadership. SoCalGas met with both Federally- and Non-Federally recognized Tribes, as well as Tribal community leaders. There are 19 Federally-

[25] The report does not disclose performance numbers for any particular contractor by name. In 2023, it listed all contractors 1 –12 and each customized report letting each individual contractor know where they placed in a given month (ex: if they were the 8 best, the contractor is informed their respective ranking is "8"). They can then reference their given rank to see the current percentage towards their therm savings goal.

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 Tribes, as well as Tribal Community organizations and members to help build awareness about SoCalGas's Customer Assistance Programs (ESA Program, CARE, MBL, etc.) as well as trust amongst the community.

SoCalGas also worked internally with its Regional Public Affairs representatives 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:

- In person Outreach Presentations and/or meetings to Tribal Organizations such as: Tribal Alliance of Sovereign Indian Nations (TASIN), the American Indian Chamber of Commerce of California, Southern California Indian Center and Indigenous Women Rising

- Outreach was conducted to the Tribes included in chart below:

Tribal Nations	
Agua Caliente Band of Cahuilla Indians	Ramona Band of Cahuilla Indians
Augustine Band of Cahuilla Indians	San Manuel Band of Serrano Mission Indians of the San Manuel Reservation
Cabazon Band of Mission Indians	Santa Rosa Band of Cahuilla Indians
Cahuilla Band of Mission Indians of the Cahuilla Reservation	Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation
Chemehuevi Indian Tribe of the Chemehuevi Reservation	Soboba Band of Luiseño Indians
Fort Mojave Indian Tribe	Tachi Yokut Tribe of Indians
Los Coyotes Band of Cahuilla and Cupeno Indians	Torres-Martinez Desert Cahuilla Indians
Morongo Band of Cahuilla Mission Indians	Tule River Indian Tribe of the Tule River Reservation
Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation	Twenty-Nine Palms Band of Mission Indians of California
Tribal Nations Represented by Organization	
Fernandeno Tataviam Band of Mission Indians	Juaneno Band of Mission Indians
Gabrieleno (Tongva) Band of Mission 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.[26] Additionally, SoCalGas

[26] Please refer to ESA Table 15, Tribal Outreach, in the attachments for additional details.

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.

SoCalGas did not implement any new Energy Management Technology programs that could have been added to its ESA Program in 2023.

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 allows their home to remain comfortable, their energy use to decrease, and prevents their furnace from working 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.[27] 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 delivered during the enrollment process.

1.2.8 Services to Reduce Energy Bill

Prior to ESA Program enrollment, customers are informed of the potential energy and bill savings they may 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 through a leave-behind infographic provided after enrollment. This includes information on the CARE program, which provides a 20% discount on their energy bill, the Medical Baseline program which provides additional natural gas as the lowest rate for qualifying medical conditions, Past Due Bill Forgiveness programs, appliance rebates, and access to the My Account portal which assists customers in tracking and paying their bills as well as managing gas services. Finally, the principal benefit of installing ESA Program measures is to reduce energy consumption and provide bill savings.

[27] SoCalGas received the U.S. Environmental Protection Agency 2023 ENERGY STAR Partner of the Year award for demonstrating leadership in its energy efficiency programs that incorporates ENERGY STAR as a key strategy to help increase the adoption of energy efficiency products in homes, buildings and facilities.

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 PY2023, SoCalGas treated 56,058 homes through the committed funds period, which was 80% of its household treatment target of 69,837.

One factor that led to fewer homes treated was the transition of Southern MFWB program from being handled by the main ESA Program contractor network to the third-party implementer with SDG&E as the administrator in 2023. The process to select the implementer and allow them to prepare to treat multifamily homes did not allow commencement of the program until July 1, 2023. After that, the implementer began to develop the workforce to treat multifamily homes but was only able to ramp up (but not complete work) in 2023. The first multifamily homes treated by the implementer will take place in 2024.

While SoCalGas made pronounced improvements towards its therm savings goals, the learning curve impacted the number of homes it was able to treat. More time was spent at each home than in previous years resulting in fewer homes treated. New design requirements were new to both the IOUs and the contractors, and there were challenges with knowledge transfer and confirming contractors understood the new obligations and types of activities expected to be performed.[28]

[28] Application (A.)19-11-003, Joint IOUs Joint Energy Savings Assistance (ESA) Midcycle Progress Report, Section 2.5.4 at 8-9.

However, it should be re-emphasized that although SoCalGas treated less homes in 2023, it increased it therm savings per home from six (6) therms per home to over 20 therms per home, an increase of nearly 242%. Furthermore, after achieving 52% of the therm savings goal in 2022, SoCalGas recorded 85% of its total annual therm savings[29] goal for the entire portfolio (an increase of 33% from 2022).

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

In 2023, SoCalGas continued to use Categorical Eligibility (CE)[30] and self-certification[31] as methods to streamline customer enrollments to the ESA Program. Both methods of determining eligibility decrease the types of income documentation required for customers to enroll into the program. With CE, customers can provide documents validating recent participation in one of the designated state or federal assistance programs and do not need to provide additional income documentation to enroll into the ESA Program and/or CARE. With self-certification, customers who live in designated low-income PRIZM

[29] Total annual therm saving portfolio includes main ESA Program and MFCAM therm savings.
[30] 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.
[31] 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. D.21-06-015 allows customers to self-certify that they meet the ESA Program eligibility requirements to receive ESA basic measures.

codes need to only provide a total household stated annual income and sign a statement certifying their income meets the program's income eligibility guidelines.

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.[32] 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 IOU's ESA Program enrollment for SoCalGas ESA Program enrollment. For the first half of 2023, SoCalGas contractors continued enrolling renters residing in deed-restricted properties using the self-certification method. The enrollment type "Owner Verified" was utilized

[32] A Categorical Eligibility Study was conducted in 2023. Please see section 1.8.1 below for additional details.

to enroll customers using the joint IOU Property Owner Authorization (POA) and Affidavit allowing building owners to certify their tenants' eligibility for the program, thereby removing the burden of providing eligibility documentation from the tenant.

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 made substantial strides in 2023, increasing its total portfolio therm savings[33] from 741,410 in 2022 to 1,223,807 in 2023, through the committed funds period. This represented an increase of 482,397 therms, and fulfillment of over 85% of the 1,435,220 therm savings goal for 2023. It should also be noted that the main ESA Program treatments alone contributed the overwhelming majority of therm savings in 2023, as the MFWB program did not ramp up as expected to contribute to them savings. Despite the strong performance of the main ESA Program, there were some other challenges which hindered SoCalGas from meeting 100% of the goal.

Contributing Factors

As the only natural gas single-fuel utility, SoCalGas's challenges are complex and

[33] Portfolio them savings includes main ESA Program plus MF CAM savings. Main ESA Program savings alone achieved 80% of total portfolio therm savings allocation and 92% of main ESA Program allocation.

unique from other IOUs. In addition, the shift in focus to therm savings impacted the marketability of the program as customers may feel this is not the same program they heard about or experienced in the past. Also, contractors faced challenges serving some of SoCalGas's more disadvantaged customers who may not be able to benefit from certain program weatherization measures[34, 35] due to the neutral or negative therm savings associated with the installation of those measures. This has caused contractors to be more selective when choosing certain homes or installing certain measures, to align with and achieve the energy savings goal.

The furnace repair or replacement measure is a key example of this. If a customer has an inoperative furnace, the customer cannot use this equipment, and therefore is not using energy. However, when the furnace is repaired or replaced, the equipment becomes operative and begins using energy (compared to zero prior usage) resulting in negative savings. Contractors must prioritize which measures they install to effectively make progress towards deeper energy savings.

Supply chain issues also caused a disruption in SoCalGas's ability to operate at full capacity for the entirety of 2023. In general, the lingering impacts in supply chains impacted by COVID-19 continue. An issue with SoCalGas's HE washer supplier significantly diminished SoCalGas's ability to leverage this dependable

[34] Program weatherization measures as defined by California Public Utilities Code § 2790(b)-(c).
[35] Whole House Weatherization available at https://www.energy.gov/scep/wap/whole-house-weatherization.

measure to save therms for much of 2023. After saving 73,672 therms in the ramp up year in 2022, the measure only accounted for 15,559 therms saved in 2023. SoCalGas addressed this issue before the conclusion of 2023 and will focus efforts on rebounding this measure in the upcoming program years.

Another significant factor affecting SoCalGas's ability to meet its therm savings goal was the newly launched Southern MFWB program's inability to produce any therm savings in 2023. Southern MFWB had 169 in-unit installations that commenced in late 2023 but were not finished by year end. Therefore, the Southern MFWB program did not report any completed in-unit or common area/whole building projects or therm savings in 2023.The offboarding of MF CAM from the main ESA Program contractors to the new MFWB implementer in 2023 was a necessary step to adhere to the directive in D.21-06-015 requiring a third-party implementer to take over MFWB. Now that this process is complete, MFWB is expected to resume contributing to therm savings for the SoCalGas ESA Program in 2024.[36]

As mentioned, two (2) new measures were added to the SoCalGas ESA Program measure offerings that helped increase the therm savings significantly in 2023. The tankless water heater was one such measure, and the introduction of the measure modification process in the ESA WG impacted the timing of bringing this measure into the SoCalGas ESA Program portfolio. Once installations began,

[36] MFWB achieved zero therm savings in 2023.

the measure proved to be one of the most effective measures in the SoCalGas ESA Program measure portfolio. As a result, a new measure modification process was implemented by the Policy and Procedures and Installation Standards (PP&IS) Sub-working Group to allow measures to be introduced more expeditiously in the future. Also noteworthy, the tankless water heater is a new measure also available to mobile home customers.[37]

HCS was also a major challenge for SoCalGas and its contractor network in 2023. Many HCS measures installed produced minimal and often negative therm savings, but provided HCS benefits to low-income customers. For example, the furnace repair/replacement measure(s) produced *negative* 4,407 therm savings. Additionally, the furnace clean and tune measure produced 3,077 *negative* therm savings. This totals 7,584 in *negative* therm savings produced from these measures.[38] From an energy savings standpoint, this is an inefficient use of contractor time and resources and negatively impacts the Performance Based Incentive (PBIs) in our contractor's agreements and are program results that do not reflect value received by ESA Program customers.

HCS measures have been at the heart of the ESA Program since its inception. A customer's access to heat via furnace repair/replacement and furnace clean and tune provide essential access to heat for our low-income customers during the

[37] D.21-06-015, OP 63 directs IOUs to "… propose new Energy Savings Assistance program measures as they become available…". Eighty-two tankless water heaters were installed in mobile homes in 2023.
[38] Data derived from Table 2.

colder months. SoCalGas communicated these challenges in its Midcycle report and is supportive of addressing them through the ESA WG process.

To combat these challenges which contributed to falling short of the therm savings goal, SoCalGas made programmatic enhancements to further support deeper energy savings focus and support the contractor workforce. Some of these changes include:

1. The addition of tankless water heaters to the current measure offerings to increase therm savings and provide installation opportunities.
2. The addition of smart fan controllers to the current measure offerings to increase therm savings and provide installation opportunities.
3. Modifications and inclusion of key performance indicators to help guide contractors achieve deeper therm savings.
4. Revisions to contract/financial terms allowed alignment with energy savings objectives.
5. Participating with other IOUs and stakeholders, including contractors in ESA WG meetings which led to programmatic improvements in 2023.
6. Provided contractors with monthly assessment reports, including therms saved per month and a quantified measure mix to advise contractors which measures would yield the contractors the most savings, should they be combined in one treatment.

These changes, and others documented in the report, resulted in SoCalGas nearly doubling (approximately a 94% increase) its main ESA Program therm savings from 2022 (632,019) to approximately 1.15 million in 2023. This feat is one of the notable achievements of SoCalGas in 2023, and the trend is undoubtedly positive for SoCalGas.

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 from 8% in PY2022 to 10% in PY2023. 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 PY2023 included working with key organizations and sponsoring some key events as listed below. 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
- Deaf Latinos y Familia
- Disabilities Community Resource Center
- Fiesta Educativa
- Frank D. Lanterman Regional Center
- Goodwill of Orange County
- Greater Los Angeles Agency on Deafness
- Orange County Autism Foundation
- South California Resource Services for Independent Living (SCRS-IL)
- South Central Los Angeles Regional Center

SoCalGas had representation at 277 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
- Deaf Latinos Y Familias American Sign Language classes
- Disability Community Resource Center Food Distributions and Case Management Meetings
- Fiesta Educativa's Fiesta Familiares Zoom and In-person Workshops
- SCRS-IL Essential Care Packages, Support Groups, Resource Fairs and Food Distributions
- Greater Los Angeles Agency on Deafness One on One appointments
- South Central Los Angeles Regional Center members meetings and Resource Fairs
- Frank D. Lanterman's Essential Care Packages, and Food Distributions as well as online support and training meetings.
- Orange County Autism Foundation's Crisis Call Line, OC Health & Education Talk show on Local Public Access Television, and Kids Club Subscription information distribution
- Abilities Expo: Annual Expo showcasing latest tech and disability products, informative workshops, and interactive events and features
- Triumph Foundation Adaptive Sports Festival: Annual event geared towards introducing adaptive sports to more people and increase inclusiveness and awareness of people living with disabilities in the community
- Ability First Stroll and Roll: Annual Fundraising Walk supporting children and adults with developmental disabilities

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 2023, SoCalGas sustained its commitment to accessibility by producing large-

print customer assistance program brochures for vision-impaired customers, ensuring ESA Program information was readily available. Additionally, Braille customer assistance program brochures were distributed to Community Based Organizations (CBOs) supporting Braille users, placed at SoCalGas Branch Payment Offices (BPOs), and featured at outreach events.

Since 2019, SoCalGas's My Account online bill pay system has proudly held the AA[39] Seal of Approval from the Center for Accessible Technology (CforAT), meeting AA accessibility standards. This certification enhances online accessibility, particularly in the "Account" section of the website. As of 2023, SoCalGas maintains this certification, reporting its AA status in CforAT's annual report.

Conducting regular audits aligned with Web Content Accessibility Guidelines (WCAG), SoCalGas's web team promotes compliance. The website is designed to facilitate navigation and content consumption for vision-impaired customers using screen readers and similar assistive technologies. Ongoing updates prioritize customer accessibility, reinforcing SoCalGas's commitment to an inclusive online experience.

[39] 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.

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

Disability Enrollments			
Source	**Total Enrollment**	**Disability Enrollment**	**% of Disability Enrollment**
Campaign	1,676	46	3%
Capitation	73	9	12%
CARE Referral	3,873	132	3%
CARs Referral	135	6	4%
CPUC 2020 Clear Plan	376	72	19%
Direct Mail	395	67	17%
Energy Efficiency Referral	132	21	16%
ESA Mobile-ESAP SCE	90	4	4%
Gas Bill Insert	612	137	22%
HEAT Canvassing List	565	44	8%
InfoLine 211	45	4	9%
Joint Utility-Data Sharing	1	0	0%
Joint Utility-ESAP SCE	2	0	0%
LIHEAP	68	16	24%
Master Agreement	96	23	24%
Media/Leveraging Dept./Event	63	9	14%
Muni	42	4	10%
Neighbor/Friend/Relative Referral	1,538	267	17%
Newspaper/Radio/Television	70	12	17%
Other Utility or Municipality Referral	216	51	24%
Outreacher - Canvassing	34,383	3,268	10%
Received services at another location	76	16	21%
REN Referral	6	0	0%
SCG - GAF/Medical Baseline	17	0	0%
SCG - Internet	231	44	19%
SCG Referral	1,670	347	21%
SoCalGas Email	421	85	20%
Telemarketing - Telephone	3,656	418	11%
Univision - Telethon	26	3	12%
Whole Neighborhood Approach	1,422	0	0%
Total	**51,976**	**5,105**	**10%**

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

Although the participation rate for disabled enrollments fell below the 15% goal in PY2023, 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. Three new organizations (South Central Los Angeles Regional Center, Greater Los Angeles Agency on Deafness, and Deaf Latinos y Familias) were added to assist in outreach and building awareness with the disability community. SoCalGas's outreach included presentations, workshops, training of organization staff and case workers and distributing program materials both printed and electronic for one-on-one visits 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. In PY2023, SoCalGas continued to increase collaborative partnerships with organizations that worked towards enrolling individuals with disabilities that may qualify for the ESA Program as well as other Customer Assistance Programs such as CARE and MBL and participated in events specifically geared towards community members. As in previous years, SoCalGas has continued to focus its

efforts on organizations and events located in underpenetrated areas to reach special needs customers.

1.5 Leveraging Success Including LIHEAP

In PY2023, 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 are some examples of cost savings to the IOU.
- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to 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 13A – Leveraging & Integration in the attachments.

Additionally, information regarding LIHEAP leveraging efforts in terms of enrollment increases can be found on ESA Program Table 12 – Categorical and Other Enrollment in the attachments.

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

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 PY2023 the following agencies participated in leveraging water measures:

- Anaheim Public Utilities[40]
- California American Water[41]
- Eastern Municipal Water District[42]
- Elsinore Valley Municipal Water District[43]
- Fontana Water Company[44]
- Liberty Utilities[45]
- Metropolitan Water District[46]
- Moulton Niguel Water District[47]
- San Gabriel Valley Water Company[48]
- Rancho California Water District[49]

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[40] Anaheim Public Utilities ("APU") – delivers water to the city of Anaheim's 345,000 residents and more than 15,000 businesses.
[41] California American Water serves customers throughout California, and its collaboration with SoCalGas focuses on customers residing in Los Angeles and Ventura Counties.
[42] Cities in the Eastern Municipal Water District service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula.
[43] Elsinore Valley Municipal Water District serves the cities of Lake Elsinore, Wildomar, Murrieta and Menifee.
[44] Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.
[45] Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.
[46] 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.
[47] 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.
[48] 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.
[49] Rancho California Water District is a special water district serving approximately 150,000 people in Temecula, Murieta, and unincorporated areas of Riverside County.

As a result, co-funding from all water agencies totaled $1,011,954 in PY2023.

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 PY2023 include:

- Anaheim Public Utilities[50]
- Pasadena Water and Power[51]
- Riverside Public Utilities[52]

Municipal Utility	Number of Units Served
Anaheim Public Utilities	1,186
Pasadena Water and Power	7
Riverside Public Utilities	330
Total	**1,523**

SoCalGas also collaborated 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),

[50] Anaheim Public Utilities – delivers electricity to the city of Anaheim's 345,000 residents and more than 15,000 businesses.
[51] 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
[52] 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.

weather-based irrigation controllers, and smart hose bib controllers that are entirely funded by Metropolitan.

Water Agency	Number of Units Served
Metropolitan Water District	1,852

In 2023, SoCalGas entered a new collaboration with Los Angeles Department of Water and Power (LADWP) to install premium high efficiency toilets (0.8 or 1.0 gallons per flush to replace existing toilets with 1.6 gallons per flush or higher) that are entirely funded by LADWP. LADWP is also co-funding other measures such as HE clothes washers, faucet aerators, low flow shower heads, thermostatic shower valves, and tub spouts.

Agency	Number of Units Served
Los Angeles Department of Water and Power	1,366

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 13A – Leveraging & Integration.

In PY2023, 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 purchase costs may otherwise limit low-income customers from realizing the water and energy savings. 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, as well as demonstrates SoCalGas's support for statewide conservation efforts.

1.5.3 Please provide a status of the leveraging efforts 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), LIHEAP and SoCalGas's ESA Program. In 2023, SoCalGas contracted with two LIHEAP agencies to conduct enrollment, assessment, and installation services for the ESA Program. As part of their outreach and enrollment efforts, these two agencies can leverage LIHEAP payment assistance customers as leads for ESA Program treatment. LIHEAP contractors can leverage the LIHEAP income verification process, reducing the valuable time required of contractor personnel to enroll eligible customers into the ESA Program for needed program services. In 2023, LIHEAP contractors enrolled 15,740 customers into the ESA Program, nearly one of every three 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 continues to install cold-water measures funded entirely by these water agencies. One example is SoCalGas's partnership with Metropolitan Water District to install premium HE toilets and weather-based irrigation controllers. Additionally, SoCalGas partners with Los Angeles Department of Water and Power to install premium high efficiency toilets through the ESA Program.

1.6 Integration Success

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

In 2023 SoCalGas continued to employ data sharing, Integrated Voice Recognition (IVR), Customer Contact Center (CCC), and other efforts 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, the ESA Program, and MBL. This message is also reinforced by live CSRs when customers call to establish service or make bill payment arrangements. CSRs initiate conversation about the CARE program and take applications over the phone during these specific calls. Additionally, a separate IVR phone number is printed on self-certification and recertification

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

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

Customer Contact Center (CCC): Since February 2018**,** SoCalGas CSRs have been offering CARE and enrolling customers during turn-on and payment extension calls. Information regarding other customer assistance programs is provided to facilitate enrollment of eligible customers in the ESA Program and MBL. When a customer expresses interest in the ESA Program, a direct 800 telephone number is provided. MBL applications are mailed upon request. In addition, SoCalGas offers information on integrated programs for residential customers by mailing a conservation package during CCC bill inquiries. The package includes information on the ESA Program, CARE, MBL, Energy Efficiency (EE) rebates and 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 PY2023, the SoCalGas Single Point of Contact (SPOC) and SoCalGas CARE teams collaborated closely in further expanding multi-property portfolio ownership group enrollments. SoCalGas SPOCs continued to use the streamlined CARE application/enrollment process to increase affordable property participation. Feedback from participating affordable housing portfolio owners continued to be very positive. During the year, the SPOCs were able to deliver CARE program enrollments for 12 MF group living properties with over 400 total units. Additionally, MF SPOCs enrolled/delivered 15 EE in-unit projects for a total of 1,489 units.

SoCalGas's MF SPOC team also collaborated with peers throughout the SoCalGas organization in delivering/serving multiple high-profile, affordable projects (Heritage Housing, Home Aid OC, etc.) This integrated approach enabled customers to participate in the ESA Program, EE, CARE, and more.

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 no longer has Local Government Partnership programs, instead

leveraging third-party programs to engage with local governments and deliver energy efficiency programs. SoCalGas provided Customer Assistance Program information, including the ESA Program to Local Government 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.

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.

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 that can deliver additional energy savings.

To highlight one success story, SoCalGas SPOCs teamed up with affordable housing provider, Heritage Housing, on an innovative Pasadena, California project that provides housing options for at-risk Pasadena City College (PCC) students. Heritage Housing completely refurbished and transformed two structures into six (6) approximately 375 square foot studio apartment units with common laundry facilities. These units were created to house PCC students who are transitioning out of foster care and are experiencing housing insecurity and

homelessness. Project partners included Pasadena City College, Pasadena Housing Department, Pasadena Community Foundation, Heritage Housing, SoCalGas SPOCs, and others. This SoCalGas SPOC project was enrolled in the Multifamily Energy Alliance (ME) Program tankless water heater rebates. The project also enrolled students into SoCalGas's CARE program, providing a 20% discount on monthly gas bills. SoCalGas SPOCs and Customer Relations teams also collaborated in creating Amazon Wishlists, to which SoCalGas employees company-wide contributed, to help students get items they will need for their new apartments such as cleaning supplies, laundry items, utensils, home décor, and more.

As part of the successful SoCalGas SPOC model, customer-facing SPOCs direct their efforts towards outreach to MF building owners and managers to gain connections within the non-profit affordable housing marketplace. Detailed portfolio owner data is captured and compiled early on, which enables SPOCs to quickly and thoughtfully deliver cost-effective recommendations that reduce energy use/operating costs and improve each owner's bottom line. Additionally, the SPOCs have been receiving a steady stream of customer referrals from organizations that have been previously served via EE, ESA Program, CARE, Muni/Water partner programs.

SoCalGas's SPOC team continues to refine its communication and coordination strategies. The objective is to allow customers, particularly multifamily property

owners, to receive comprehensive services and incentives regardless of the customers' income qualification by communicating low-income and energy efficiency program options.

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, and 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 2023. Funding was not available for this program year.

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

This section is not applicable to SoCalGas.

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

During Q3/Q4, 2023 in coordination with the Southern MFWB program launch, SoCalGas SPOCs delivered 24 common area and in-unit projects for a total of 6,396 units. None of these projects moved forward into the approved production phase in 2023 and will be completed in 2024.

SoCalGas SPOCs also referred three (3) projects to the EE MFWB program and one (1) portfolio project was also submitted for a recently launched Federal Grant Demonstration Project Program. The team continues to coordinate leveraging opportunities with water agencies and municipal electric providers.

It is important to note that existing, large affordable housing portfolio customers have faced significant challenges with the Southern MFWB program enrollment including required documentation and project review/acceptance. One of the biggest challenges has been a requirement that owners provide unit-specific income data before enrollment. The majority of large, affordable property owners maintain strict confidentiality on tenant income/personal data. SoCalGas's SPOC team continues to provide possible solutions and customer feedback on this and other important issues.

Overall, affordable property owners throughout the SoCalGas service territory are currently overwhelmed determining how to handle possible tenant evictions after COVID-19 eviction protection mandates were recently lifted. Large-scale capital improvement projects remain on hold for many market-rate/affordable housing owners due to inflationary pressures and increased costs of projects. In 2024, projects may increase if equipment pricing stabilizes, labor rates increase at a slower rate, and/or supply chain availability times return to normal.

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 2023, SoCalGas continued to promote the growth of a trained workforce and 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. As mentioned earlier, contractors continue to provide their own training to canvassers and telemarketers. The SoCalGas-developed curriculum has been provided to contractors for their use when hiring canvassers who do not enter customers' homes or telemarketers who seek customer interest via a live phone 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 introduced in the workforce and education space was to offer and maintain a fully online E&A training and testing platform to prospective ESA Program Representatives. For the past four 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 making the material available 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 E&A testing at least three times a month to 255 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.

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 encourages contractors to hire from the communities they serve. Contractors document the home ZIP code for each E&A ESA Program Representative candidate that attends E&A training, using that information to determine the number of candidates from disadvantaged communities.

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 PY2023, SoCalGas continued to provide various training courses including initial E&A, In-Home Energy Education, Natural Gas Appliance Testing (NGAT), refresher invoicing trainings, HEAT system, and ESA Mobile site training as well as training on 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 complete enrollments and home assessments as well as provide In-Home Energy Education must successfully pass the required SoCalGas E&A 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 training courses are all designed to provide comprehensive policy and procedure training to its ESA Program workforce. In 2023, SoCalGas Field Operations continued conducting all initial training in weatherization, HVAC, and inspection services via an in-person format. Throughout 2023, Field Operations conducted 31 initial and refresher classes for 214 installers.

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 promote 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 training 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 2023, SoCalGas hosted 10 virtual invoicing training sessions, including hands-on, screen-share activity enabling SoCalGas to 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.

For 2023, 100% of incentive dollars was spent on contracts with a demonstrated commitment to increase workforce opportunities for workers in disadvantaged communities, including the hiring of local disadvantaged workers, worker training, and career-ladder job development.

Number of Community Workforce Resources (CWR) participants who have been employed for 12 months after receiving the training.

In 2023, statewide, 133 CWR participants have been employed for 12 months after receiving training. This number does not include CWR participants who were employed in 2023 but did not meet the 12-months of employment criteria, or those who are still actively involved in training and have not yet been placed in jobs.

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

In 2023, SoCalGas's IEET program (SoCalGas's WE&T training program) conducted more than 180 seminar/webinar/training sessions, more than 135 outreach consultations, and over 125 equipment demonstrations. These training classes reached over 9,700 participants, with more than 35% meeting the definition of a disadvantaged worker.

1.8 Studies

1.8.1 For each active 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 2023. Budgets associated with these authorized studies are provided in ESA Program Table 14 – Expenditures for Pilots and Studies.

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion
2025 Low Income Needs Assessment	Evergreen Economics	SoCalGas	Jan 2024	Dec 2025
Categorical Eligibility Study	Evergreen Economics	SDG&E	June 2022	May 2023
Non-Energy Impacts Study	Evergreen Economics	SCE	July 2023	June 2025

2025 Low Income Needs Assessment (LINA) Study[53]

The Low Income Needs Assessment (LINA) is a mandated study required to be completed every three (3) years per Assembly Bill (AB) 327 and Public Utilities Code (PUC) §382(d). Upon completion of the 2022 LINA Study, planning activities for the 2025 LINA Study commenced. The primary focus of the upcoming LINA will be on understanding the needs of customers with especially high or low energy usage. In terms of activities thus far, in February 2023 the team began writing the Scope of Work and elected SoCalGas as contract manager

[53] The LINA Study is mandated to be completed every three years per AB 327 and PUC §382(d).

of the study on behalf of the four IOUs and Energy Division. During August 2023, following revisions and additional discussions with the Low Income Oversight Board (LIOB), the Request for Proposals (RFP) was finalized and released to potential bidders. The proposals were received and scored in September. Evergreen Economics (Evergreen) was identified as the winning bidder, and contract negotiations began in October. The contract with Evergreen was signed in December 2023. The study officially commenced in January 2024.

The Research Plan for the LINA study is in progress, so there has been no activity as of year-end 2023 on the study itself.

During Q1 2024, the consultant and study team will draft a more detailed study plan based on initial feedback and discussions about the proposed plan. In Q2 2024, a draft research plan is expected to be shared and presented to the public and the LINA Subcommittee of the LIOB for additional input. Data collection is expected to commence in Q3 2024 after which time the consultant will begin analysis and reporting. The study must be completed by December 2025.

Categorical Eligibility Study

The IOUs operate three energy assistance programs for income qualified households that allow for categorical enrollment. 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 programs[54] for which the customer's income is verified by the appropriate state and federal agencies. CARE, FERA and the ESA Program all 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.

The statewide Study Working Group finalized the Scope of Work for the study. The RFP was published in February 2022. The IOUs and ED scored all proposals and selected Evergreen 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 proposed the work plan to the IOUs on August 31, 2022. The comments on the Categorical Eligibility Study webinar were addressed in the month of September 2022. Evergreen delivered the first draft to the IOUs in early December 2022.

In January 2023, Evergreen prepared a memorandum that presented the Categorical Eligibility Study preliminary analysis results. This memo provided tentative results and recommendations from an on-going study of categorical

[54] *See* Public Assistance Programs via: California Alternate Rates for Energy CARE | SoCalGas.

eligibility options for the CARE the ESA Program. Eligibility requirements and verification processes for 17 third-party programs that serve low-income households in California were examined and compared to CARE and ESA Program. Evergreen presented the draft report via public webinar on May 23, 2023 and also presented on the report at the June 15, 2023 LIOB meeting. The final report was posted on June 30, 2023. The deadline to submit the joint-IOU Advice Letter (AL) outlining the IOUs' recommendations was extended to October and was submitted on October 13, 2023, with SoCalGas supportive of continuing programs with broad alignment overlap. On October 20, 2023, the AL was suspended for 120 days and continues to be subject to ED staff review.

Non-Energy Impacts (NEI) Study

D.21-06-015 authorized a NEI study with a budget of $500,000 and directed the ESA Program Working Group (ESA WG) to provide inputs on study scope.[55] A Tier 1 AL was subsequently submitted jointly by PG&E, SCE, SDG&E and SoCalGas, which informs the Commission of the next steps to be taken to begin the study, and how the recommendations from the ESA WG will be taken into consideration. The primary objective of the NEI Study is to assess and quantify health, comfort and safety impacts as a result of ESA Program treatments. Competitive solicitation for the study concluded in December 2023 and Evergreen Economics was selected to conduct the study. A project kickoff is scheduled for 2024, and the study is expected to be completed by June 2025.

[55] D.21-06-015, OP 172.

1.8.2 1.8.2 For studies that concluded in 2023, submit a Final Study Report describing: 1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.

Categorical Eligibility Study

(1) Overview of Study

SDG&E, on behalf of the IOUs, contracted with Evergreen Economics in June 2022 to review and assess means-tested public assistance programs that could serve as a way to qualify households categorically for the CARE, ESA Program and FERA programs. The objectives of this study included:

1. Determine the degree of alignment of eligibility requirements of existing categorical eligibility programs with those of the CARE, ESA Program, and FERA programs;

2. Identify other means-tested programs that could serve to ensure categorical eligibility;

3. Recommend practical criteria for selection of programs to be used to provide categorical eligibility, and recommend which programs should provide categorical eligibility going forward; and

4. Inform potential future auto-enrollment of participants from recommended categorical eligibility programs directly into CARE or FERA by assessing the suitability of auto-enrollment for recommended categorical programs and the steps required to establish auto-enrollment.

Beginning July 2022, the IOUs met with Evergreen and the ESA Program CARE Study Working Group[56] to discuss the study work scope and refine the work plan. A draft research plan was presented during a public webinar August 31, 2022, and comments received during the webinar were incorporated into a final research

[56] The ESA CARE Study Working Group consists of representatives from the IOUs, Energy Division, the Public Advocates Office, Community Housing Opportunities Organization, American Ecos, and The Utility Reform Network.

plan. During the subsequent months, Evergreen began researching 17 public assistance programs and conducted telephone interviews with representatives of the assistance programs to collect information on their eligibility requirements and application processes. Responses from these interviews were entered into an informational database which were used during the analysis phase of the study. An interim results memorandum describing the analysis process and results was provided at the end of October and shared with the ESA Program CARE Study Working Group for discussion and feedback.

An additional task in the study involved assessing the feasibility of automatic enrollment for CARE and FERA using categorical programs. A draft report was presented during a public workshop on May 23, 2023, and again at a LIOB meeting on June 15, 2023. The study was finalized on June 30, 2023, and the final report, public comments on the report, and a database of program characteristics used in the analysis were posted on the Commission's public document website.[57] Results of the study were subsequently used to inform a joint IOU AL proposing an updated list of categorical programs to be used for ESA Program and CARE enrollments.[58]

(2) Budget Spent versus Authorized Budget

The authorized budget for this study was $150,000.[59] The total spent on this study

[57] https://pda.energydataweb.com/#!/documents/2814/view
[58] Advice Letter 4304-E/3240-G dated October 13, 2023.
[59] D.21-06-015 at OP 170.

was $149,960. The costs were split among the four IOUs using the following split: Pacific Gas & Electric (PG&E) 30%, SCE 30%, SoCalGas 25%, SDG&E 15%.

(3) Final Results of Study and (4) Recommendations

Evergreen collected data on 17 third-party assistance programs which were identified by the IOU study team and stakeholders, including the nine statewide programs currently used for categorical eligibility by CARE and the ESA Program.[60] They developed a set of criteria to organize and assess the alignment of the programs with the statutory eligibility requirements. Criteria for assessment included the unit of eligibility (e.g., individual or household), income eligibility thresholds, other non-income eligibility criteria, duration of program participation, and assurance of eligibility. Each categorical program was then assessed and classified according to the extent they aligned with CARE and ESA Program eligibility requirements. The table below shows the results by category.

[60] The nine current programs include the Bureau of Indian Affairs (BIA) General Assistance, CalFresh (Food Stamps) / SNAP, CalWORKs (TANF) or Tribal TANF, Head Start Income Eligible (Tribal Only), Low-Income Home Energy Assistance Program (LIHEAP), Medicaid/Medi-Cal for Families A & B, National School Lunch Program (NSLP), Supplemental Security Income (SSI), Women, Infants and Children (WIC). Additional programs assessed include California Head Start, Lifeline, Children's Health Insurance Plan (CHIP), Housing Choice Voucher Program (Section 8), Supportive Housing for the Elderly (Section 202), California's Military Family Relief Fund (CMFRF), Chafee Foster Care Independence Program (CFCIP), Child Care and Development Block Grant (CCDBG).

Study Recommendations by Category

Category	Category Description	Recommendation	Programs
1	Best aligned	Recommended	CalFresh, WIC
2	Next best aligned	Recommended with modest risk	LIHEAP
3	Partially aligned and possibly feasible	Option to use partially if feasible to allow only income qualified	AIAN Head Start, California Head Start, CalWORKS, Lifeline, SSI
4	Partially aligned and less feasible	Not recommended	CHIP, Medi-Cal, NSLP, Section 8, Section 202
5	Least aligned	Not recommended	CMFRF, CFCIP, CCDBG
6	Unable to assess due to lack of information	No recommendation possible	BIA General Assistance

As shown, Evergreen recommended the IOUs consider retaining both Category 1 and Category 2 programs as categorical eligibility enrollment options. In addition, they noted that Category 3 programs could be partially considered if it were possible to identify participants who qualified based on income and not alternative paths to entry. Evergreen further recommended not using programs in Categories 4 and 5 for categorical enrollment as their use would include a significant risk of enrolling non-eligible customers. Finally, the study reported the use of categorical eligibility for FERA would not be practical given 1) FERA's narrow income range for eligibility and 2) none of the third-party programs analyzed use a minimum household size of three individuals as required by FERA.

It is important to note that none of the recommendations in this study preclude any income-eligible household from receiving reduced rates under CARE or energy-saving measures under the ESA Program. The elimination of a categorical

program does not change any income eligible household's access to CARE or ESA Program. Households may still apply through self-certification of their income.

An additional task in the study assessing the feasibility of using categorical programs for auto-enrollment into CARE or FERA. For CARE auto-enrollment, the study reported auto-enrollment would be feasible but may be of limited benefit. For FERA, however, the study reported none of the programs reviewed would be able to identify potential FERA participants.

1.9 Pilots

1.9.1 For each active 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 ESA WH. After reviewing the pilot guiding principles, SoCalGas and SCE jointly decided to implement the pilot in their shared service territory. This joint approach provides 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.

(1) Pilot Summary

ESA Whole Home focuses on matched dual fuel high-usage customers defined as low-income CARE customers with electricity consumption reaching 300% baseline and higher (i.e., 300%+) and with gas consumption reaching 200% baseline and higher (i.e., 200%+).

It is the Commission's expectation that ESA Whole Home treatments will require a greater investment per customer household and will yield deeper energy savings with targets between 5 to 15 percent savings through the Pilot Plus measure package and 15 to 50 percent savings through the Pilot Deep measure package.

There are a number of activities that have been supported by the evaluation team since pilot implementation including data collection, data security and transfer procedures, and management and quality control process plans; sampling design, baseline assessment of customer segmentation, annual checks of sample design; and impact evaluation plan and engineering review of EE deemed measures.

(2) Pilot Progress

The ESA Whole Home pilot has initially had very limited participation. As of January 13, 2024, from a total of 34 customers (at different stages of the enrollment process), pilot participation has only been completed for a total of two Pilot Plus and four Pilot Deep customers.

Beginning in Q4 2023, the evaluation team additionally supported technical review of deemed measure packages and savings leveraged by the pilot. The objective of this review was to identify any potential for low realization rates and provide suggestions for any adjustments the joint utilities could make to deemed savings estimates; hence, better align evaluated savings to claimed savings and mitigate the risk of low realization rates in situations where a deemed savings approach is used to estimate impacts. Overall, the review did not yield any major concerns with the savings methodology for any of these deemed measures, and the current ESA measure package was determined to be adequate and in alignment with the electronic Technical Reference Manual (eTRM) measure package requirements and/or list of approved measures.

Additionally in 2024, the evaluator will continue its efforts to support a total of three contractor interviews to better understand the lack of participation of the ESA Whole Home pilot. Preliminary findings from these interviews suggest that contractors' experience with the pilot processes, beyond recruitment, is extremely limited. This is largely due to the challenges contractors have had enrolling customers into the pilot. Furthermore, contractors identified several issues that

impede their ability to enroll customers and complete projects including issues in the following areas:

- Recruitment challenges;
- Customer concerns; participation requirements;
- Pilot processes.

(3) Future Activities

SCE and SoCalGas continue to collaborate with the implementer and evaluation team and take necessary steps to increase customer participation. This includes SCE, SoCalGas and implementer developing co-branded marketing material in 2024 to increase legitimacy for the customer upon viewing both utility logos on marketing materials. In addition, in 2024, the joint utilities along with the implementer plan to launch direct mail and email campaigns which will include co-branding. The response rates from the email campaigns are anticipated to sizably increase customer enrollment. Furthermore, the joint utilities have discussed with the evaluation team to broaden the target list. These pragmatic enhancements are expected to increase customer participation in the program moving forward.

There are several evaluation-related activities expected to be supported in the future. These process evaluation activities will provide a better understanding of the lack of participation and barriers to customers enrolling in the pilot. The evaluator will perform these activities in Q3 2024. The specific activities include nonparticipant surveys and additional contractor interviews (including field staff after increased participation). Consideration will be given to supporting contractor ride-

alongs in the future if participant interviews indicate potential implementation issues.

(4) Status of Pilot Evaluation Plan (PEP)

The evaluator has conducted several activities in 2023. These activities include:

- Completion on implementation contractor and subcontractor
- Data management and quality control maintenance (ongoing)
- Achieving current cybersecurity alignment with SoCalGas
- Finalizing the recurring implementation data transfer
- Impact Evaluation plan completed
- Contractor survey or interview guides
- Finalization of questionaries
    - Preinstallation, post-installation, and non-participant

Later in the year (Q4 2024), an impact evaluation of the pilot, including approach and methodology for evaluating pilot's energy efficiency savings and savings realization is expected to be re-evaluated as pilot participation increases.

More information regarding ESA Whole Home can be found in Sections 1.1.1 and 1.2.2 of this annual report.

1.9.2 For pilots that concluded in 2023, 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 2023 for SoCalGas.

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.21-06-015[61] established the mandate for implementing the ESA Program Working Group (ESA WG) with a list of required tasks and actions.

In 2022, the IOUs responded to D.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)/Concurrent Application System SWG (CAS 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 Program/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 majority while documenting the disagreements. These disagreements and open items are

[61] D. 21-06-015, Section 10.2.2.1 at 413.

compiled and tracked in a 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 SWGs, a Basecamp site 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 PY2023?

2023 ESA Working Group

In 2023, the ESA WG retained seven (7) non-IOU members, comprised of contractors and non-profit organizations. In addition, the ESA WG completed seven (7) statewide public meetings throughout 2023 to engage ESA WG IOUs, non-IOU member organizations and the public.

2023 Cost Effectiveness Sub-Working Group

Per D.21-06-015,[62] the Cost Effectiveness (CE) SWG's scope is to provide recommendations on cost-effectiveness test considerations via a progress report

[62] D.21-06-015, OPs 85, 86 at 491-492.

no later than the end of Q1 2023, and also provide recommendations on the Non Energy Impacts 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 promote project consistency and continuity.

During the period of March 2022 to March 2023, the CE SWG met to discuss the cost effectiveness guidelines presented in D.21-06-015. These guidelines direct the IOUs to "use an average portfolio level 0.7 ESACET score as a guide when developing their ESA Program portfolio measure mix each program year and aim for a portfolio level of 0.7 ESACET. The IOUs shall re-evaluate all measures with ESACET scores of less than 0,3 to determine if the measure should be removed from the portfolio, giving limited exceptions to measures that provide valuable HCS benefits, high energy savings, or other programmatic benefits."[63]

The CE SWG reviewed proposals for modifications to the guidelines and discussed issues related to the cost effectiveness inputs and tests. In March 2023, SDG&E, on behalf of the IOUs, served the progress report to all parties on the service list for A.19-11-003, et al. The CE SWG recommendations can be found within the progress report.

[63] D.21-06-015 at 250.

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

The PP&IS SWG continued executing its core functions of incorporating timely updates to the PP&IS manual to support program implementation throughout 2023. The SWG addressed issues related to the IOUs safety programs, and other contractor related issues. In addition, the SWG provided the IOUs with a streamlined mechanism for introducing, retiring and modifying measures that provides transparency and efficiency in program operations.

2023 Universal Application System (UAS)/Concurrent Application System (CAS) SWG

D.21-06-015[64] 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.

Although the UAS SWG delegated its charter back to the ESA WG, in 2023 the Commission issued an Assigned Commissioner Ruling (ACR) to reopen the consolidated proceeding and amended the scope to address the implementation of Senate Bill (SB) 1208 and the potential funding needs relating to the implementation of a Concurrent Application System (CAS) pursuant to D.23.05-006. In May 2023, CPUC staff convened a CAS SWG to develop the design requirements for CAS. The IOUs provided support to CPUC staff and the CAS SWG which resulted in a robust CAS design for inclusion in the RFP. In October

[64] D.21-06-015, OP 45.

2023, the ED concluded the CAS WG meetings for CAS Phase 1. PG&E issued the CAS RFP in December 2023, in accordance with the timeline established in D.23-05-006.

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

In December 2022, D.22-12-029[65] ordered the IOUs to form a SWG under the ESA WG 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 CARE/FERA SWG was established in February 2023 and met biweekly for six months. CARE/FERA PEV SWG members included IOUs, ED, Cal Advocates, ValleyCan, Liberty Utility, and other ad hoc members. The SWG was facilitated by a representative from Statwizards, LLC.

The scope of the CARE/FERA PEV SWG included:

- 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 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.

[65] D.22-12-029, OP 2, 3 at 20-21.

Pursuant to D.22-12-029, the IOUs held a public meeting to discuss the SWG's recommendations and ideas that could be immediately implemented by the IOUs. Additionally, the recommendations of the SWG, next steps to implement any recommendations, as well as discussions and activities related to other initiatives and directives as part of D.21-06-015 were submitted as part of the IOUs' Midcycle Progress Report.[66]

The ESA WG recommended that the CARE/FERA PEV SWG conclude in 2023. The IOUs will continue to meet during their scheduled joint utility meetings to discuss and adopt best practices and processes.

1.10.3 What are some of the goals for each WG and SWG in PY2024?

2024 ESA Working Group

The ESA WG and Council are expected to be active for the duration of 2024. Some of the planned activities and goals include:

- Continue regular meetings with stakeholders, ensuring all topics of interest that are required by the CPUC are addressed.
- Provide a forum for the IOU's annual report summary meeting
- Plan for wind-down activities, as the facilitator's contract expires at the end of PY2024, and the IOU's set-aside budget for the ESA WG facilitation is expected to be exhausted by year end.
- Wrap up key learnings and takeaways from the overall ESA WG experience, with respect to the need and value of continuing the ESA WG

[66] Investor-Owned Utilities (IOUs) Energy Savings Assistance (ESA) Program Midcycle Progress report at 76-81.

in future program years to help inform the IOU's next program applications.

2024 Policies and Procedures and Installation Standards (PP&IS) SWG

The PP&IS SWG will focus on updating program manuals as needed and providing review and approval of new program measures throughout the next program year.

2024 Concurrent Application System (CAS) SWG

In Q1 2024, the CAS team will publish an RFP requesting proposals for the development of the CAS. Upon receiving the proposals, the team will score and select a successful bid and connect with the vendor to begin development of the tool.

1.10.4 Cost Effectiveness SWG Progress Report Summary – PY2023

As described in section 1.10.2 above, the CE SWG issued its progress report in March 2023. Below are excerpts of the report's key recommendations:

Question	Recommendation
How should the cost-effectiveness guidelines in this decision be used by the IOUs to inform ESA Program design?	The Subgroup recommends that the measure-level cost-effectiveness guidelines should be modified as follows: 1. IOUs should report both ESACET and TRCRatioNoAdmin test results for the measure level. 2. For any measure that fails both tests, one of the following must be provided in order to retain the measure: • Reference Public Utility Code; • Reference documentation of HCS; • Rationale for launching new measure; or • Description of measure group efficiency.
Are there are any recommendations around how the cost effectiveness guidelines in this decision should be changed?	
Are there any recommendations on how the IOUs could better use cost-effectiveness tools to make program design decisions while also meeting the other goals laid out in this decision?	

	This modified process should be used as a preliminary step for the ESA Working Group's measure modification process and decision making for which measures should be kept or removed from the ESA Program. The Subgroup recommends no change to the portfolio-level cost-effectiveness guidelines or processes.
How can the Resource Test continue to provide benefit to ESA Program decision making and program design? Should the Resource Test be continued or discontinued?	The Resource Test should be discontinued at the portfolio level. It should also be discontinued at the measure level since the TRCRatioNoAdmin test provides the same results for all measures.
Can the Societal Cost Test (SCT) be used as another cost-effectiveness assessment for the ESA Program? Are the pros and cons of using this test for ESA?	The Subgroup recommends monitoring Order Instituting Rulemaking 22-11-013 for resolution of issues related to the SCT before considering using the test for the ESA Program. See Table 2 for pros and cons discussed.
Should societal NEBs be included in ESACET? If yes, which ones? How would including societal NEBs interact with societal impacts already taken into consideration in the CET's Total Resource Cost and Societal Cost Test?	Societal NEBs should not be included in the ESACET at this time but may be reconsidered in the future when new information is available from related efforts in other proceedings and/or new studies. Any societal impacts added in the future should not duplicate existing inputs to the test.

1.10.5 Midcycle Progress Report – PY2023

As D.21-06-015 established new program designs, deeper treatment tiers, and various pilots and studies, the Commission mandated a joint Midcycle Progress Report for the continuous monitoring of the ESA Program's progress to measure the impacts of the new changes – especially given that the Commission approved a six-year cycle.

Per D.21-06-015, the report covers the following issues:

- Whether the energy savings goals set in D.21-06-015 are aligned with the Potential & Goals study results
- Whether the IOUs are on track to meet the goals and targets set in D.21-06-015
- Whether any of the goals or targets set in D.21-06-015 need to be updated in light of the data and new information collected during the first half of the program cycle
- Best practices under the new designs

- Status of the Pilot Plus and Deep program, and
- Status of the ESA Program's cost effectiveness level under the new guidance thresholds.

The report was submitted on December 20, 2023.[67] The updates and suggestions included in the report were reviewed by the ESA Working Group. In addition, feedback was received across an array of topic areas from six (6) stakeholder groups. The majority of the feedback and comments received were incorporated into the respective sections of the final report.

Summary of recommendations detailed in the report:

- The IOUs do not recommend changes to Goals, Targets or Budget at this time
- Currently, the IOUs do not recommend any new changes to the budget methodology for "carryover" funding
- The IOUs do not recommend establishing goals for Health, Comfort and Safety (HCS) metrics at this juncture in the program cycle
- The IOUs recommend the Commission confirm that the annual energy savings goals identified in Section 6.7.8.1 of D.21-06-015 remain an important performance indicator of cycle goal achievement, measured and reported annually, but only used cumulatively in the determination of overall program cycle (2021-2026) goals
- The IOUs recommend including Cost-Effectiveness and Energy Savings Goals as a future discussion with the ESA WG with potential to adjust in the next program cycle
- The IOUs recommend working with ED staff to identify the appropriate avenue to clarify the MF property definition such that the definition could adequately account for the diverse range of multifamily property types encountered by the MFWB program.

[67] Investor-Owned Utilities (IOUs) Energy Savings Assistance (ESA) Program Midcycle Progress Report.

As contemplated in the Decision, the IOUs intend to continue its collaboration with the ESA WG on key issues impacting the ESA Program.

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 June 29, 2023, in conjunction with the June ESA Working Group monthly meeting. There the IOUs presented an overview of their 2023 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 2023 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

	All MF Properties				**Central Facility**		**Master Meter**	
Category	Number of Properties	Avg Sq. Ft.	2023 Annual Therms (‘000)	Therms per Property	2023 Annual Therms (‘000)	Energy Use Intensity (Therm/Sq. Ft)	2023 Annual Therms (‘000)	Energy Use Intensity (Therm/Sq. Ft)
Has Sq. Ft. Data	15,457	19,955	23,609	1,527	11,938	0.06	11,671	0.10
Sq. Ft. Data Missing	2,861	N/A	5,183	1,812	2,621	N/A	2,562	N/A
All properties	18,318	--	28,792	1,572	14,559	--	14,233	--

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
2023	218

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 activities[68] 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

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

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
   a. In-Unit
   b. CAM
7. CAM / SPOC Coordinates with Stakeholders
   a. Property Owner
   b. ESA Program CAM Contractors
   c. Other IOUs and/ Muni / 3rd Parties
8. Install Measures
   a. Utilizing appropriate ESA Program, 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 Program Portfolio Manager
   f. Customer Sign-off

1.12.3 The IOUs shall conduct and report an annual Normalized Metered Energy Consumption (NMEC) analysis of the multifamily common area initiative.

I. 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 the SoCalGas's Energy Savings Assistance Program Multifamily Common Area Measures projects (ESA CAM). This backcast analyzes 29 projects that were completed between September 2021 and December 2022. In a backcast, Recurve assesses savings via a measurement of changes in normalized meter-based consumption (NMEC) that customers experienced after participation. The backcast analysis enables the identification of important and actionable aspects of program outcomes, especially as these insights relate to meter-based performance. For this backcast, Recurve is using the CalTRACK 2.0 Hourly methods to measure the gas savings at each meter enrolled in the program. The meter-level results are aggregated to produce project and portfolio-level savings. In SoCalGas's ESA CAM projects, customers receive upgraded boilers and water heaters. New systems are installed by a participating contractor. Depending on the multifamily housing configuration, these systems may serve common areas that are separate from the housing units themselves or may also serve building tenants. Table 1 gives a summary of results.

Table 1: Backcast Results By Project

Project	Number of Meters	Number of Qualified Meters	Reporting Year 1 Savings (therms) ↓	Reporting Year 1 Counterfactual (therms)	Reporting Year 1 % Savings
GCL	2	2	3,946	21,441	18%
MP	1	1	3,237	14,870	22%
SBG	2	1	2,207	11,116	20%
MCL	1	1	2,158	6,363	34%
FP	1	1	1,666	9,400	18%
CP	1	1	1,536	4,414	35%
AT	1	1	1,413	9,461	15%
A	1	1	1,264	6,469	20%
CCL	1	1	1,043	3,407	31%
MSV	1	1	898	15,691	6%
CDLH	1	1	849	7,803	11%
GNI	1	1	778	4,554	17%
V	1	1	664	4,011	17%
LC	2	2	593	7,759	8%
WCL	1	1	566	5,041	11%
OA	1	1	441	2,956	15%
CC	1	1	380	4,928	8%
SS	1	1	317	2,690	12%
ER	1	1	-75	2,350	-3%
ASL	1	1	-94	2,898	-3%
WM	1	1	-367	2,977	-12%
CII	2	2	-509	3,804	-13%
CJL	1	1	-762	6,922	-11%
PSP	1	1	-1,204	11,054	-11%
RVV	1	1	-1,285	18,673	-7%
MA	1	0			
JA	1	0			
PA	1	0			
GNI-R	3	0			
Totals	35	28	19,658	191,055	10%

Across the 29 projects, Recurve received data for 35 meters. Recurve was able to make a qualified savings calculation for 25 of the projects - the remaining four (4) were disqualified from the analysis (see Section II for details). For the 25 projects combined, Recurve calculates 10% savings.

Table 2: Backcast Results By Meter

Project ↓	Reporting Year 1 Savings (therms)	Reporting Year 1 Counterfactual (therms)	Reporting Year 1 % Savings	Disqualification Reason
A	1,264	6,469	20%	
AT	1,413	9,461	15%	
ASL	-94	2,898	-3%	
CP	1,536	4,414	35%	
CDLH	849	7,803	11%	
CC	380	4,928	8%	
CCL	1,043	3,407	31%	
CJL	-762	6,922	-11%	
CII	-88	957	-9%	
CII	-420	2,847	-15%	
ER	-75	2,350	-3%	
FP	1,666	9,400	18%	
GCL	3,948	21,332	19%	
GCL	-2	109	-2%	
GNI	778	4,554	17%	
GNI-R	-	-	-	baseline_data_sufficiency_not_met
GNI-R	-	-	-	baseline_data_sufficiency_not_met
GNI-R	-	-	-	baseline_data_sufficiency_not_met
JA	-	-	-	reporting year 1 pct_savings >0.5
LC	357	3,455	10%	
LC	236	4,305	5%	
MSVM	898	15,691	6%	
P	3,237	14,870	22%	
MA	-	-	-	baseline_data_sufficiency_not_met
MCL	2,158	6,363	34%	
OA	441	2,956	15%	
PA	-	-	-	baseline_data_sufficiency_not_met
PSPR	-1,204	11,054	-11%	
VV	-1,285	18,673	-7%	
SBG	2,207	11,116	20%	
SBG	-	-	-	baseline_data_sufficiency_not_met
SS	317	2,690	12%	
V	664	4,011	17%	
WM	-367	2,977	-12%	
WCL	566	5,041	11%	

Recurve was able to make a qualified calculation for 28 of the 35 meters included in the backcast. Of the seven (7) disqualified meters, six (6) were removed for insufficient baseline data and one (1) was removed as an outlier (see Section II for details).

II. 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.[69] 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.[70] In measuring savings, Recurve first establishes a model based on the 365 days leading up to program participation. This time period is known as the "baseline" period and the model as the "baseline" model. Recurve then projects this model into the 365-day period following program participation (the "reporting" period")

[69] The 1 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.

[70] www.recurve.com

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-19 or other population level impacts, though further comparison group analysis can be conducted as needed.[71]

Recurve removed meters with insufficient baseline data, including meters with less than 328 days of data in the baseline period and meters with less than 90% of hours in any month in the baseline period. Recurve also removed meters 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.

[71] In order to isolate and remove COVID impacts from program impacts a comparison group analysis should be undertaken. Recurve recently developed open source methods and code (GRIDmeter) to automate comparison group selection and analysis. See: https://gridmeter.recurve.com/methods.html 4 3/15/2024

III. Figures

Figure 1: Savings vs. Predicted Usage for ESA 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. However, there is also a downward trend in savings as a function of usage for projects that did not generate positive measured savings.

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

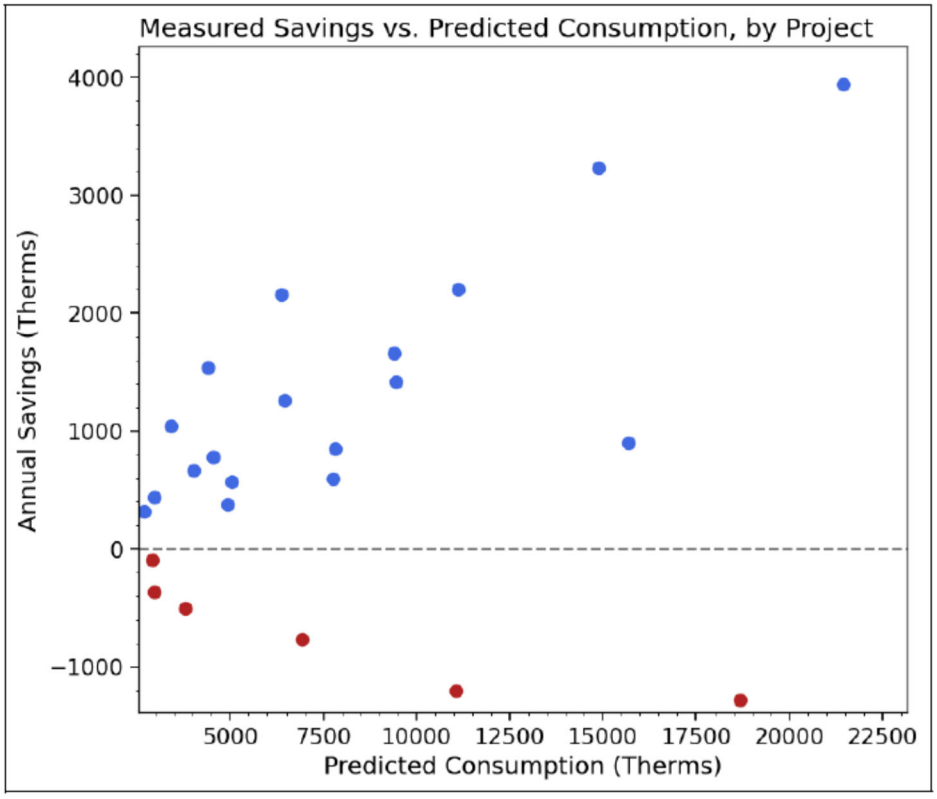


Figure 2: Savings Distributions

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

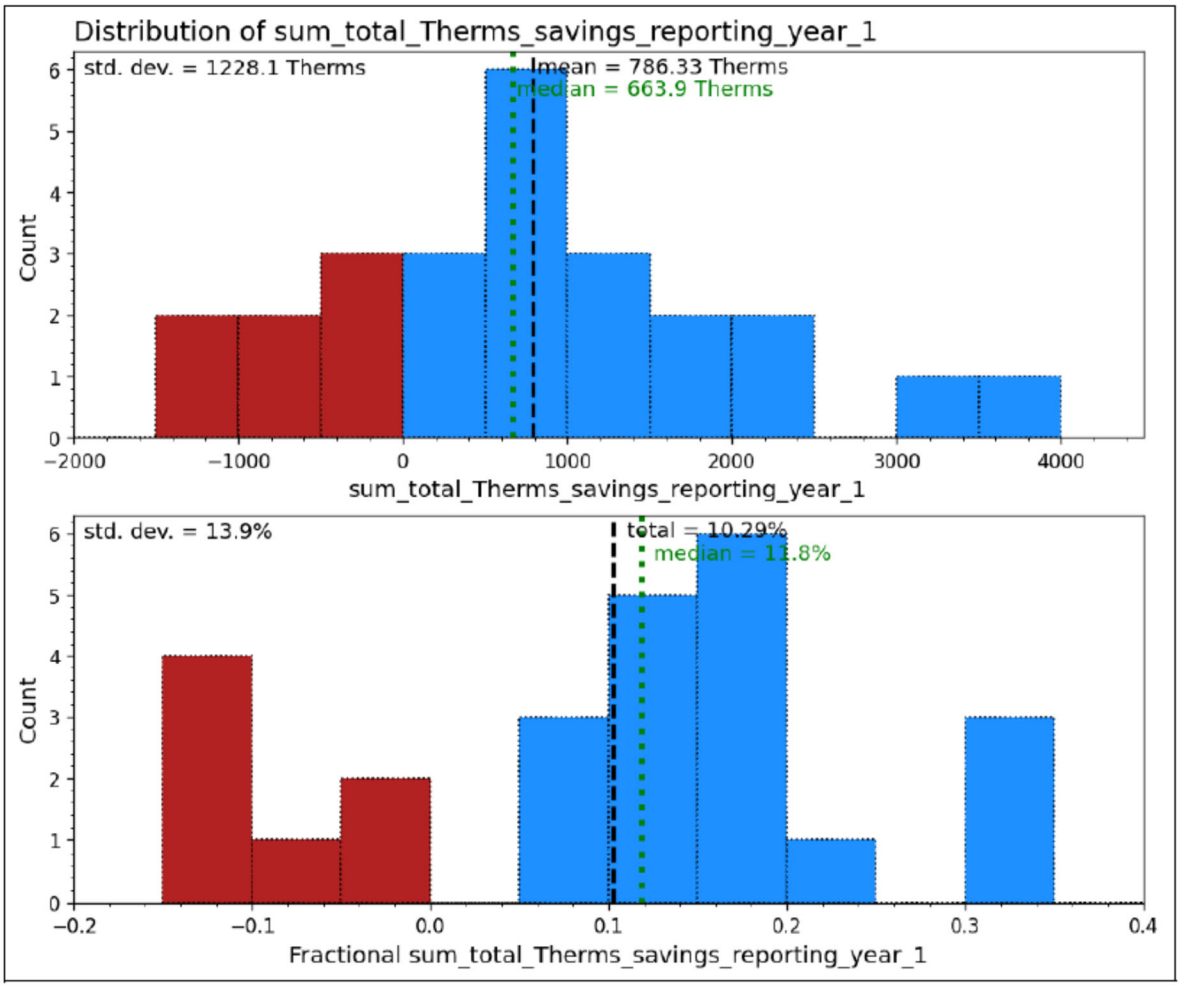


Figure 3: Hour of Day Results by Month

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

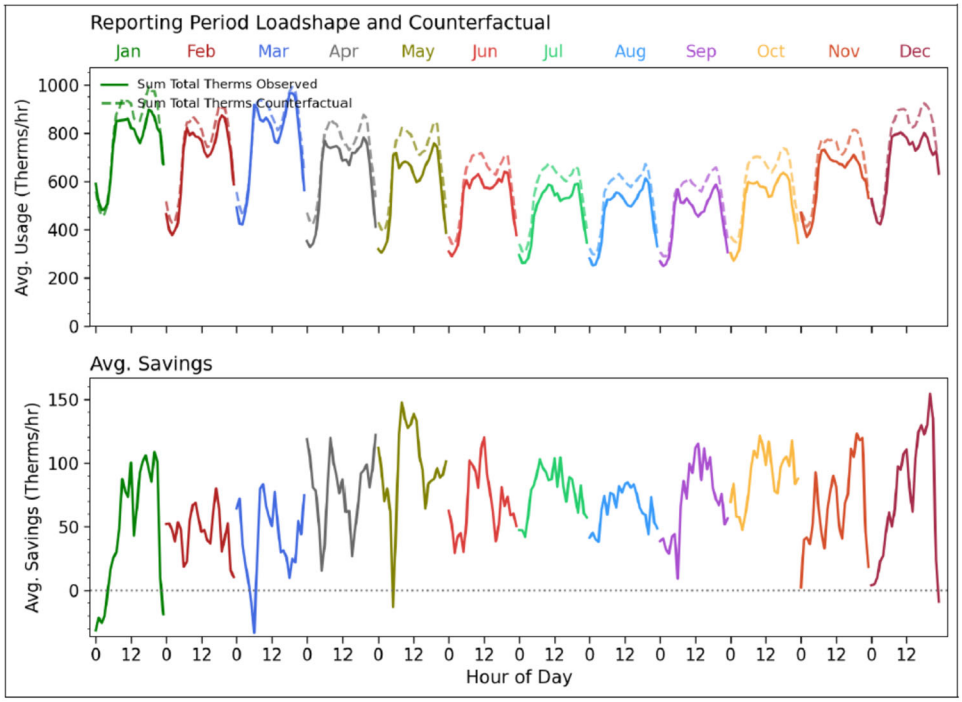
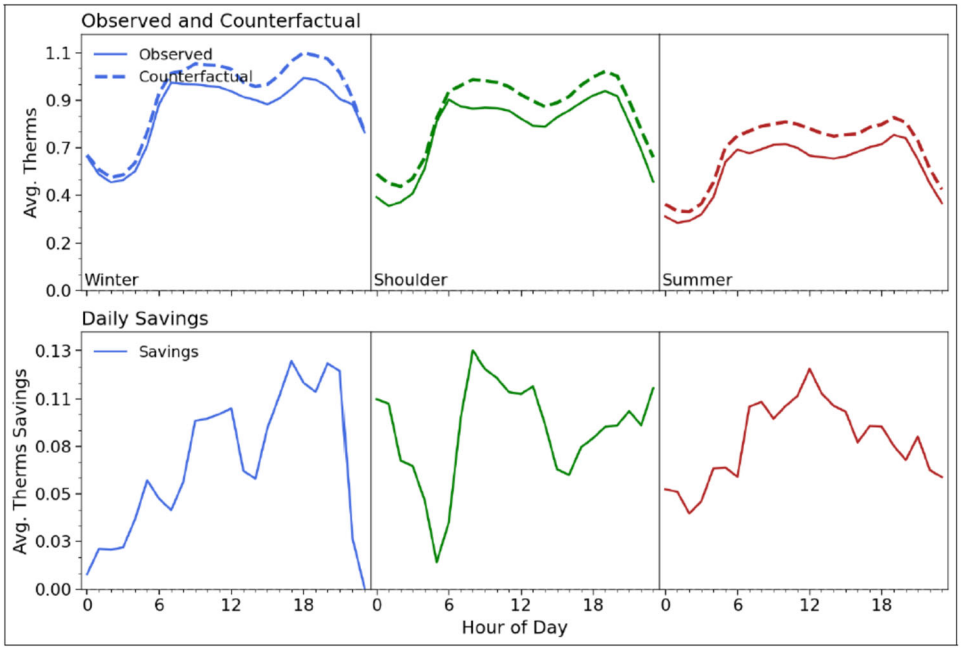


Figure 4: Hour of Day Results by Season

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).[72] 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.

[72] *See* D.05-10-044, OP 1, at 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 2023, SoCalGas continued its trend of having a successful program year. This report provides information on SoCalGas's CARE program accomplishments and expenditures for PY2023. At year-end of PY2023, the CARE program had enrolled 8% more customers than 2022, over 342,753 new customers, exceeding its 95% target with a penetration rate of 109.6%. Other notable achievements and key activities of the CARE program in 2023 include:

- Expansion of real-time enrollment through CSRs during turn-on and payment extension calls to all types of calls, resulting in almost 130,000 new enrollments, the largest source of new enrollments for 2023;
- 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 141,854 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 2023, per the CARE All-Party Meeting Ruling.[73]

[73] 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.

- Renewed or initiated Memos of Understandings (MOUs) with 43 community- and faith-based organizations and participated in over 2,500 events promoting SoCalGas's Customer Assistance Programs.

- Conducted a joint IOU workshop to discuss the revamp of CARE enrollment, recertification and PEV forms per the PEV Sub-working Group recommendations to align on best practices and improve customer retention and processing efficiency.

- Completed CARE Post Enrollment Verification Outbound Call Pilot in April 2023, validating existing best practices.

- SoCalGas co-led the Statewide CARE PEV Sub-working Group which filed recommendations in the 2023 Low Income Midcycle Report.

- SoCalGas completed its annual CARE probability model refresh, increasing model accuracy to improve program integrity.

2.1 Participant Information

2.1.1 Provide the total number of residential CARE customers for the reporting period, including submetered tenants, by month, and by energy source, 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 2023	1,795,788	0.78%
Febraury 2023	1,826,446	1.71%
March 2023	1,851,578	1.38%
April 2023	1,863,928	0.67%
May 2023	1,871,697	0.42%
June 2023	1,868,851	-0.15%
July 2023	1,854,553	-0.77%
August 2023	1,856,845	0.12%
September 2023	1,861,268	0.24%
October 2023	1,863,033	0.09%
November 2023	1,853,073	-0.53%
Decmeber 2023	1,836,582	-0.89%

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 continued to use the joint utility methodology adopted in D.01-03-028 for developing monthly enrollment estimates by energy source in 2023. This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the 2023 eligibility estimates included the January 2023 Health and Human Services (HHS) FPG ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small area vendor marginal distributions on household characteristics, Census 2020 Summary File 3 (SF3) data, Census American Community Survey (ACS) 2018-2022 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 PY2023.

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:

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

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 2023, based on the available eligibility data, of SoCalGas's 5,759,644 residential CARE-eligible meters, 29.10% or 1,675,824 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 2023, SoCalGas had 119,558 sub-metered tenants in 1,438 master-meter facilities. Assuming, by the methodology described above, 43.65% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 52,187 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 2023, SoCalGas had 27,521 sub-metered tenants participating in the CARE program.

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

SoCalGas estimates 53% of its CARE-eligible sub-metered tenants were enrolled in the CARE program as of the end of PY2023.

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

In PY2023, 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 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 verify 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	$4,396,184	$4,566,299	104%
Proc., Certification and Verification	$2,239,036	$1,441,473	64%
Post Enrollment Verification	$247,690	$216,758	88%
Information Tech./Programming	$1,090,222	$907,959	83%
Pilots	--	$(16,436)	N/A
CHANGES	$437,502	$429,668	98%
Studies	--	$10,843	N/A
Regulatory Compliance	$549,966	$320,680	58%
General Administration	$1,141,195	$1,137,593	100%
CPUC ED Staff	$79,568	$47,552	60%
Total Expenses	**$10,181,364**	**$9,062,389**	**89%**
Subsidies and Benefits***	**$140,801,916**	**$266,305,157**	**189%**
Total Program Costs and Discounts	**$150,983,280**	**$275,367,546**	**182%**

* 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 unusually high January bills.

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?
1,836,582	1,675,842	109.6%	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 2023.

October: Information was received through the Customer Comment Tracking (CCT) system. The customer stated receiving a text message on October 31, 2023, regarding the program and recertification. The customer mentioned that the text contained a link and requested personal

information. The marketing advisor reached out to the customer, detailing our procedures, reassuring the customer that the text was not fraudulent, and explained the process further. The customer expressed satisfaction with the follow-up call.

December: Information was received through the Customer Comment Tracking (CCT) system. The customer alleges that during a discussion with a CARE representative regarding the recertification process, the representative turned hostile and verbally abusive upon the customer introducing political topics. The CARE representative calmly informed the customer that he had been recertified for the program, explained SoCalGas's policy of not discussion political topics, while making best efforts to de-escalate the situation and ended the call.

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 PY2023 was $11.99[74] per month.[75]

[74] 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.
[75] This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

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

SoCalGas's CARE customers and CARE Expansion customers (i.e., farm and migrant workers and those living in non-profit group living facilities or agricultural housing) received $263,781,436 in natural gas rate discounts and $2,523,721 in Service Establishment Charges (SEC) discounts in PY2023. The PY2023 annual subsidy for all SoCalGas CARE customers was $266,305,157.

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,[76] postage, bill inserts, brochures, flyers, advertising/mass media campaigns, text messaging, direct mailing campaigns, email campaigns, translations, social media,

[76] 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.

third-party outreach, door-to-door canvassing, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Compensation for CBOs who are paid monthly stipends based on agreed amounts in Memos of Understandings are also included in this category. Forty-three CBOs were utilized in 2023 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 incremental 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 2023, the CARE balancing account was under-collected by $43,323,739.

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 Marketing, Education and Outreach (ME&O)

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

In 2023, SoCalGas remained dedicated to amplifying awareness and increasing participation in the CARE program through a blend of targeted and grassroots marketing and outreach strategies. These efforts encompassed multimedia advertising campaigns, direct mail, email correspondence, text messages, bill inserts, door-to-door canvassing, and active involvement in community outreach events. In addition to these targeted tactics, in PY2023, 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 PY2023 SoCalGas continued partnership 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

forms of help such as: medical, dental, optometry, behavioral health, social services, youth services, and financial assistance. Chinatown Service Center is supporting the CAP outreach team by distributing program collateral to their clients and community members.

In PY2023 SoCalGas partnered with PARS Equality Center which is located in Sherman Oaks, CA and helps communities in the San Fernando Valley and surrounding areas. The organization primarily serves the Iranian and Persian-speaking population but also serves other underrepresented communities, helping them to integrate into American society. PARS' multilingual staff include 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.

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 at information stands placed throughout the medical center.

Ethnic Media: Ethnic media plays a crucial role in reaching out to hard-to-access customers. For instance, SoCalGas collaborates with Chavez Radio Group (KMYX, Bakersfield & KUFW, Visalia) to enhance awareness of its Customer Assistance Programs, particularly among farmworkers and undocumented residents with Limited English Proficiency (LEP). These demographic customers can be less trusting of utilities or government sponsored initiatives due to the risk of exposure and are less likely to accept programs or services. By partnering with Chavez Radio Group, SoCalGas can connect with these customers through a trusted community partner and in their language. The radio schedule includes brief, 30-second Spanish-language ads broadcast multiple times a day.
In 2023, SoCalGas ran three CARE campaigns that focused on its ethnic customers, (further discussed in the below Multi-Media section) generating approximately 23,387,624 total media impressions to the Hispanic market across a channel mix including radio, digital, television, and social media.

Customer Assistance Programs Q1, 2023 Campaign – Hispanic Market (February – April 2023)

- Display/Video: 3,441,739 impressions
- Social: 3,016,889 impressions
- Broadcast Media: 303,066 impressions

CARE Retention Campaign Q4, 2023 - Hispanic: (October – December 2023)

- Radio: 6,917,100 impressions
- Social Display: 4,268,990 impressions
- Programmatic Display: 2,288,607 impressions
- Social Video: 1,783,177 impressions
- Programmatic OLV: 627,864 impressions
- YouTube: 700,192 impressions

CAP DMV Campaign, Q4, 2023 – General, Hispanic (October 2023 – Ongoing)

- See Multi-Media section below for campaign details.

In addition to the radio spots, SoCalGas's relationship with Chavez Radio Group continued in 2023. Chavez Radio Group stations include KUFW LA Campesina 106.3 and KBHH Forge 95.3. 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. In 2023 Chavez Radio Group increased the presence of SoCalGas via social media posts on Facebook, Instagram, and X.

Multi-Media: SoCalGas coordinated three CARE paid media campaigns for PY2023. The first campaign was the CAP umbrella campaign that was launched in February and ended in April. The objective of this multi-channel targeted mass-media campaign was to increase visits to the Customer Assistance

Programs' page and increase awareness among eligible customers. The campaign included a mix of broad channels and targeted strategies to generate awareness and drive actions to the program landing page. The channel mix is broken down into television, radio, and digital such as video, display, social and native platforms. The campaign tag line, "Offering support, in more ways than one," speaks to the support that SoCalGas offers its customers by way of its Customer Assistance Programs (e.g., CARE, ESAP, and MBL) which can be found at the Customer Assistance Program's landing page. Overall, the campaign resulted in:

- 49,166,275 total impressions across all channels
  - 43,166,275 impressions across the general market
  - 6,801,694 impressions across the Hispanic/Latino market
- 79,195 Customer Assistance Programs webpage visits for the general market with an exceedingly strong session duration of over 2 minutes, demonstrating strong message and targeting effectiveness
  - 330% more website sessions year-over-year when compared to the same date range in 2022
- 9,180 Customer Assistance Programs webpage visits for the Hispanic/Latino market with a strong session duration of over 1 minute, demonstrating strong message and targeting effectiveness
  - 1,500% more website sessions year-over-year when compared to the same date range in 2022
- 8,770,386 social media impressions and 1,823,498 post engagements
  - 3,016,889 Spanish ad impressions
  - 5,753,497 English ad impressions

A notable observation is that a high number of clicks and impressions were produced by mobile devices (98% and 97% for YouTube and paid searches respectively, and mobile devices delivered an average of 76% of impressions for

display ads for both general and Hispanic/Latino audiences) which might indicate a need to focus more on mobile friendly images and videos in future campaigns.

Also, while this campaign was aimed at customer assistance programs in general, it still resulted in 31,525 CARE landing page sessions across markets, with an average session duration of over 2 minutes.

SoCalGas launched a second campaign for the CARE program from October to December 2023, targeting both existing CARE customers due for recertification and potential new enrollees. This general and Hispanic market campaign utilized a mix of digital, social media, internet search, radio, and out-of-home channels, all directing traffic to the CARE webpage in both English and Spanish.

Under the tag line, "Saving is good!" the campaign encouraged customers not to miss out on 20% savings on their natural gas bills. The primary call-to-action was to recertify promptly to remain enrolled in the CARE program. This strategic initiative aimed at reinforcing program awareness, boosting engagement, and ensuring that eligible customers continue to benefit from the valuable savings offered by CARE. Overall, the campaign resulted in:

- 42,161,217 total impressions
- 42,730 CARE webpage visits during the weeks of the campaign, with 22,219 of those visits being from users identified as being new to the webpage
- 27,212 recertifications during campaign flight, from 10/29/23 – 12/24/23
- 12,862 new enrollments from 10/29/23 – 12/24/23

- 11,716,088 social media impressions with a 2.4% CTR rate, well above benchmark (.33-.71%)

While the campaign aimed to enhance CARE retention efforts, the notable increase in session duration on SoCalGas's CARE landing page from 50 seconds in 2022 to 1 minute and 40 seconds in 2023 signifies a remarkable achievement in engaging our audience and delivering valuable content.

As stated above, in Q4 SoCalGas also launched the CAP DMV Campaign. In October 2023, SoCalGas launched a target DMV umbrella campaign designed to heighten awareness of our Customer Assistance Programs (e.g. CARE, ESA Program, and MBL) among eligible customers. This campaign aims to drive increased traffic to the respective program landing pages and the overarching Customer Assistance Program's page.

Specifically tailored to a captive general and Spanish-speaking audience within DMV locations across SoCalGas's service territory, the campaign promotes Customer Assistance Programs, with a particular focus on the CARE program. The tag line, "Offering support, in more ways than one," emphasizes the diverse support SoCalGas provides its customers through programs like CARE, ESA and MBL, accessible on the Customer Assistance Program's page.

The CARE program's creative, "Easy," hones in on the simplicity of applying and reapplying for the CARE program. The campaign's estimated impressions for the first three months (October -December 2023), totaling 34,101,159, affirm the

broad reach and impact of our efforts in the initial phase of this comprehensive initiative.

Social Media: SoCalGas implemented a new social media strategy for 2023. Instead of monthly postings, SoCalGas adopted targeted social media flights that ran Thursday to Monday once a month. This strategic shift was aimed at aligning posts with peak user activity, ensuring a more impactful social media outreach and enabling SoCalGas to utilize better analytics. To facilitate this new approach, SoCalGas partnered with an ad agency, bringing enhanced expertise to its social media strategy.

Throughout the year, CARE program-focused social media posts were strategically shared on Meta sites, Facebook and Instagram. These posts garnered significant traction, reaching approximately 151,611 unique viewers in the general market and 124,128 viewers in the Hispanic market. These posts also generated a total of 31,936 link clicks across both markets, with an average cost-per-click of $0.54. The optimization of CARE program posts for clicks resonated well with the goal of driving conversions and engagement.

Text Messages: Text messaging has proven to be a cost-effective and impactful communication channel for SoCalGas. In 2023, SoCalGas strategically employed text messages to engage eligible customers with the CARE program. These messages included a direct link to the online CARE application, encouraging both

new and existing customers not on CARE to apply. Additionally, targeted texts were sent to customers needing recertification to maintain enrollment.

Throughout 2023, approximately 429,000 carefully crafted texts were delivered to these specific groups. This approach, coupled with email and direct mailers, effectively communicated CARE program details to SoCalGas customers. These text efforts led to 8,133 new CARE enrollments.

Direct Mail: Targeted direct mail campaigns remain a versatile and highly effective strategy for CARE program enrollment. These campaigns generally reach out to individuals with a high probability of qualifying for low-income programs. The criteria for campaign targeting include CARE customers who need to re-enroll, those nearing the end of their program term requiring recertification, new eligible customers, existing SoCalGas customers not currently on CARE, and CARE customers with recent address changes.

Throughout 2023, SoCalGas continued proactive engagement with both new and existing customers not on CARE through targeted direct mail initiatives. Additionally, direct mail letters were sent to customers who had previously participated in the CARE program but failed to recertify, encouraging them to reapply online and reestablish their monthly discount.

The direct mail messaging during this period featured tailored savings information, along with clear instructions on applying for the program online. To enhance personalization, savings amounts were customized based on individual customer data from past bills for current customers not on CARE and those eligible for re-enrollment. For new customers, the message reflected the average annual savings of a CARE customer, contributing to a more personalized and impactful communication approach.

In PY2023, 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 PY2023, CARE bill messages were printed in both English and Spanish on non-participating customers' bills and were sent out quarterly. 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 4,470,000 customers) to the main Customer Assistance Program webpage to learn more.

Bill Inserts: Bill inserts remain a cost-effective means to promote program awareness and encourage enrollment, featuring bilingual content in English and Spanish with basic program details. In July 2023, SoCalGas distributed bill inserts to approximately 1.4 million residential customers, outlining annual eligibility guidelines. Additionally, to comply with the AB 3 mandate, approximately 870,000 bill inserts were sent to residential and non-residential customers at risk of service disconnection. These inserts highlighted available customer assistance programs available to help manage bills. Moreover, in September 2023, SoCalGas sent a bill insert to approximately 16,500 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: Proactive communication and outreach efforts were undertaken to cross-promote the CARE program alongside other Customer

Assistance Programs and energy efficiency initiatives, optimizing customer benefits and minimizing costs. Streamlining the application process by integrating CARE with SoCalGas's ESA Program application facilitated customers' seamless access to services and information. SoCalGas extended its outreach to promote external programs, including California Lifeline for discounted phone services and CETF for low-cost internet, enhancing the spectrum of available support. Customer data from SoCalGas's ESA Program, Gas Assistance Fund (GAF), and LIHEAP were leveraged for CARE enrollment, recertification, and verification. Specialized collateral materials developed for SoCalGas's outreach department, and field operations personnel comprehensively informed customers about all accessible low-income and special needs programs and services. SoCalGas' Field Operations Team is directed to leave CAP information materials in English and Spanish during home service visits.

SoCalGas.com Website: The SoCalGas website (www.socalgas.com) serves as a continuous 24/7 communication and enrollment platform for the CARE program. Monthly email blasts actively promote the website, guiding customers to apply by visiting socalgas.com. Additionally, paper applications sent by mail include the convenient option to apply online at socalgas.com. Customers can enroll in the CARE program in real-time using online applications through socalgas.com or through logging into My Account. 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. Customers who are selected to

complete post-enrollment verification are also encouraged to submit their required proof of documentation online via socalgas.com or My Account. 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 impairments 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 2023, CSRs completed the CARE enrollment of 116,684 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 expanded the category of customers who are enrolled by a CSR, and as of Q3 2023 are no longer limited 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, both English and Spanish CARE applications, along with informational brochures, are routinely accessible in all BPOs. The CARE program is actively promoted during each transaction, ensuring customers are aware of the available assistance. Additionally, comprehensive English and Spanish CARE posters featuring program guidelines and valuable information are prominently displayed in every BPO. These materials undergo regular updates and distribution to align with changes in program information and income guidelines. Customers visiting in person at any location receive the latest CARE program material for their reference.

Community Events: During PY2023, SoCalGas personnel along with its community partners participated in over 2,500 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. 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 PY2023 where Customer Assistance Program information was distributed included Food Distributions, Senior Kit Distributions, emergency box distributions, language and citizenship classes 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 PY2023, 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 PY2023, SoCalGas continued working with existing

organizations, and added several new key partners to expand awareness. Below are new key partners from PY2023.[77]

Deaf Latinos Y Familias: Deaf Latinos Y Familias works with Latinx families with children who are Deaf or Hard of Hearing, Deaf Adults, and non-verbal, as they integrate family history, traditions, and values into their lives to bridge the gap between two different cultures/languages/worlds. They are a family-oriented organization run by parents. Their mission is to promote awareness of the Latinx cultures to children who are Deaf or Hard of Hearing, Deaf Adults, non-verbal, and community members by providing families resources and American Sign Language classes in Spanish to bridge the communication gap. Their goal is to support parents by guiding them through the process of adapting the Deaf culture and ASL into their lives so they can pass along traditions to the next generation and maintain their culture. Deaf Latinos Y Familias offers weekly family

[77] List of organizations in PY2023 include: 211 LA County (Information & Referral Services), Blindness Support Services, Catholic Charities of Orange County, Center for Family Strengthening- Promotores Collaborative of San Luis Obispo, Chavez Radio Group-Cesar Chavez Foundation, Chinatown Service Center, Deaf Latinos Y Familias, Disabilities Community Resource Center (DCRC), El Concilio del Condado de Ventura, El Nido Family Centers, Families Forward, Fernandeño Tataviam Band of Mission Indians, Fiesta Educativa, FIND Food Bank, Foodbank of Santa Barbara County, Food Share of Ventura County, Frank D . Lanterman Regional Center, Goodwill of Orange County, Greater Los Angeles Agency on Deafness (GLAD), Human Services Association (HSA) LA, Indigenous Women Rising, Inner City Law, LIFT LA, MEND, Mixteco Indigena Community Organizing Project (MICOP), Newstart Housing Corporation, OC Autism Foundation, ONEgeneration, PARS Equality Center, South Central Los Angeles Regional Center (SCLARC), South County Outreach, Southeast Community Development Corporation (SCDC), Southern California Indian Center, Southern California Resource Services for Independent Living (SCRS-IL), St. Barnabas Senior Services, The Link Family Resource Center Serving San Luis Obispo County, The Los Angeles County / University of Southern California Medical Center-Center Auxiliary for Recruitment, Education, and Services (CARES), The Vietnamese Community of the Southern Californians (VietSoCal), Unity Shoppe, Veteran's Legal Institute, Via Care Community Health Center, Walking Shield, Worksite Wellness LA.

American Sign Language class and offers workshops where they teach the importance of family unity and how to build and strengthen the relationship between Parents and their children in DeafEd. The organization will be promoting SoCalGas Customer Assistance Programs at their workshops and ASL classes as well as at various community events.

Fernandeño Tataviam Band of Mission Indians: The Fernandeño Tataviam Band of Mission Indians (FTBMI) is a sovereign native tribe located in northern Los Angeles County. The Tribe works arduously towards the preservation of tradition and the collective well-being of the Native American community. Their distinct community originated in the lineages, villages, and culture of the pre-Mission period of California; in the regions of present day San Fernando, Santa Clarita, Eastern Simi and Antelope Valleys. The Fernandeño Tataviam Band of Mission Indians is assisting the CAP outreach team by distributing CAP collateral to their clients and community members.

Greater Los Angeles Agency on Deafness (GLAD): The mission of the Greater Los Angeles Agency on Deafness, Inc (GLAD) is to ensure equal access of the deaf, hard of hearing, deafblind, and deaf disabled community to the same opportunities afforded to their hearing counterparts. The organization's general purposes and powers are directed around the promotion of the social, recreational, cultural, educational, and vocational well-being of its deaf, hard of hearing, deafblind, and deaf disabled constituents. GLAD provides SoCalGas Customer

Assistance Programs information through their social media outlets and in-person services.

Indigenous Women Rising: In January 2023, SoCalGas began a partnership with Indigenous Women Rising Orange County. 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 put together events that promote Native American identity and wellness. The organization shares information on SoCalGas Customer Assistance Programs at community events which include Pow-Wows, Native family- oriented events, Native American Heritage month celebrations and community education workshops.

Newstart Housing Corporation: As of February 2023, SoCalGas began a new partnership with NewStart Housing Corporation, an LA County established Community Housing Development Organization (CHDO). NewStart Housing is driven by a long-term vision to provide quality affordable housing to low-income families and seniors who may otherwise not have many options for adequate shelter. NewStart Housing Corporation's work is unique in that the tenants who reside in their properties have access to numerous social service programs provided by partnered organizations. These programs include nutrition services,

health resources, childcare, advocacy, and transportation services. They currently serve an average of 2,500 customers in Los Angeles and San Bernardino Counties, including the cities of South Gate, Huntington Park, Cudahy, Bell, Bell Gardens, Maywood, Walnut Park, Chino, and Fontana.

South Central Los Angeles Regional Center (SCLARC): In May 2023, SoCalGas Customer Assistance Programs, started a collaboration with South Central Los Angeles Regional Center (SCLARC). SCLARC is a private, non-profit organization that is a comprehensive resource for evaluation, diagnosis, treatment, advocacy, and support for people diagnosed with developmental disabilities. SCLARC serves the communities of South Los Angeles, Watts, Leimert Park, Florence/Firestone, West Adams, and the cities of Bell, Bell Gardens, Compton, Cudahy, Downey, Huntington Park, Lynwood, Maywood, Vernon, South Gate, North Carson, Gardena, and Paramount. SCLARC works to ensure that eligible individuals receive support to enjoy the highest quality life possible in their community. SCLARC shares CAP information through various methods such as social media posts and one on one case management.

Capitation Contractors: In 2023, SoCalGas worked with one active capitation agency, APAC Service Center & Insurance Services to enroll eligible non-participating customers in the CARE program. "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 2023, information on participation in the capitation program was included on the SoCalGas website. Also, capitation agencies can 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. In 2023, applications were submitted by one (1) capitation agency.

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

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

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

SoCalGas employs a strategic array of outreach methods, placing a central emphasis on the efficiency and timeliness of email communication. This holistic strategy incorporates diverse channels to optimize outreach effectiveness and gauge success through various metrics.

Direct Mail:

- **Approach:** Targeted direct mail campaigns reached new customers, existing non-CARE customers, and those who lapsed from the CARE program.

- **Success Measurement:** While online enrollments from direct mail lack tracking, the success is inferred through increased program visibility and engagement.

- **Insight:** Direct mail, in both English and Spanish, directed approximately 477,322 customers to the website based on adjustable eligibility profiles, especially in high-gap or high-eligibility and low-penetration areas.

Web Based Outreach:

- **Approach:** Facilitating 28,448 new online enrollments in 2023, SoCalGas utilized multiple channels like the website, email campaigns, social media, and digital efforts.

- **Success Measurement:** Success is gauged through website visits and sign-ups at www.socalgas.com/CARE, and www.socalgas.com/CAREparami.

- **Impact of Technology:** Web transactions, including self-certification, recertification, and PEV, contributed significantly, with 63,506 and 78,348 approved transactions via My Account and web applications, respectively.

Email and Social Media:

- **Approach:** Leveraging email and social media platforms, like Facebook and Instagram, for improved effectiveness and to drive click-throughs.

- **Success Measurement:** Impressions, click-through rates, and online enrollments are key metrics. In 2023, 42,045 customers actively engaged, clicked, and enrolled in the CARE program using an email link, demonstrating the effectiveness of our email strategy.

Third-Party Door-to-Door Outreach:

- **Approach:** Third-party door-to-door outreach resulted in 14,381 enrollments in 2023, targeting the hardest-to-reach low-income customers.

- **Success Measurement:** Success is measured through the volume of enrollments and the effectiveness of a hands-on customer approach.

Bill Inserts:

- **Approach:** Over 1.4 million CARE bill inserts were sent in July 2023, enrolling approximately 1,906 new CARE customers.

- **Success Measurement:** Success is measured through enrollments resulting from bill insert dissemination.

- **Cost-Effective Strategy:** Residential bill inserts are sent only to residential customers not on CARE to optimize this channel's cost-effectiveness.

Customer Awareness:

- **Approach:** SoCalGas prioritizes targeted multi-media campaigns and grassroots partnerships to maintain and enhance CARE program awareness.
- **Success Measurement:** The success of awareness campaigns is tracked through individual channels and overall program engagement.
- **Holistic Approach:** SoCalGas views various outreach methods as interconnected and mutually reinforcing, acknowledging the impact of multiple channels on customer decisions.

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 PY2023. 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. In 2023, 34 approved CARE applications were submitted by one (1) capitation agency.

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 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,[78] and these challenges continued to be top of mind in 2023. SoCalGas used this information, along with historical data about CARE-eligible households who did not respond to participation invitations to

[78] California Low-Income Needs Assessment (LINA) Final Report: Volume 1 of 3: Summary of Key Findings (2019), at 5.

craft messaging and outreach materials. To continue addressing these barriers, SoCalGas's PY2023 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 the Hispanic/Latino 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, 'Saving is good!" was the theme of the 2023 CARE recertification campaign which aimed to educate customers on the importance of re-enrolling in order to continue to take advantage of the CARE program. A 92% video completion rate shows that this message resonated with the CARE audience. The messaging of easy and quick enrollment was featured on the CARE webpage and targeted direct marketing efforts, such as direct mail and email. These initiatives significantly contributed to increased awareness and program understanding – two common barriers to participation.

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 they 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 2023, 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 2023, 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 so 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 PY2023,

SoCalGas enrolled 48,030 SCE CARE customers into SoCalGas's CARE program and recertified eligibility for 242,042 CARE customers to retain them for another two years.

During PY2023, SoCalGas conducted a monthly data exchange with SDG&E. The exchanges resulted in 378 SDG&E CARE participants added to SoCalGas's CARE program.

SoCalGas continued a quarterly data exchange, established in PY2017, with PG&E. In PY2023, the exchanges resulted in 3,978 PG&E CARE participants being enrolled into 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,[79] SoCalGas increased the frequency of customer data exchange with participating water companies and added an additional effort in July 2020. In 2023, SoCalGas

[79] 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.

completed quarterly data exchanges with eligible and participating water utilities and added 5,133 CARE participants from the low-income water rate assistance program. SoCalGas also participated in the CARE/CAP Data Sharing Annual Meeting held on August 30, 2023.

Joint Utility Program Managers Meeting: In PY2023, 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 continues to be 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 PY2023, 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 PY2023, SoCalGas enrolled 1,858 ESA Program customers in CARE.

SoCalGas's GAF program provides qualified customers a one-time bill assistance payment for their current balance. In 2023 SoCalGas increased the grants from $100 to $400 to all eligible customers. If the customer was 55+ or had a household member 55+ living in the home they were eligible for an additional $100, for a maximum grant of $500. 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 opened in January of 2023. The program continued until October 2023. The GAF program usually has the same income eligibility guidelines as CARE, allowing SoCalGas's GAF customer data and CARE customer data to interface. 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.

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. This process helps reduce barriers to participation and assists in retaining qualified customers. In 2023 the GAF income guidelines were expanded to assist additional customers. Those

customers who were over 200% FPG but were verified for CARE via GAF interface with the option to opt-out, are sent a request to recertify their eligibility for CARE.

Through leveraging efforts with SoCalGas's GAF program, SoCalGas enrolled 2,226 new participants in its CARE program during PY2023.

In PY2023, the GAF program provided $5,160,957 in customer assistance to 18,909 customers. Funds for the program came from donations from customers, employees and shareholders.

GAF Program PY2023	Shareholder Funded Distribution
Beginning Balance as of 12/31/2022	287,709.78
Customer & Shareholder Contributions	$6,252,534.81
SHARE Program Funds Transferred to GAF	$0
Total Funds Available	$6,252,534.81
Administrative Fees and stipends	$787,449.57
GAF Payments	$5,160,956.61
Remaining Balance as of 12/31/2023	$737,142.04
Customers Assisted (number)	18,909
Average Assistance	$285.60

[1] No Ratepayer Funds were used in PY2023.

Two other customer assistance pilot programs offered by SoCalGas leverage its CARE participant data: the Arrearage Management Plan (AMP) and the Percentage of Income Pilot Program (PIPP). Eligibility for the both programs is limited to CARE-enrolled customers.

Since 2021, the AMP has provided an opportunity for qualifying residential customers to have their eligible past due bills forgiven. Once enrolled, every time a current bill is paid in full and on time, SoCalGas will forgive 1/12 of the eligible debt. After 12 consecutive monthly natural gas bills are paid in full and on time, the full amount of the eligible debt will be forgiven (up to a maximum of $8,000 per enrollment period). Since one of the qualifications for AMP is the customer must be a residential customer enrolled in CARE, customers are pre-screened for CARE enrollment prior being offered the payment plan. The SB598 Annual Disconnection report can be referred to for AMP reporting data.

PIPP is a 4-year pilot program that began January 2023 and provides eligible CARE customers with a monthly utility bill cap. CARE and PIPP leverage its customers' household size and total household income information to verify income to determine program eligibility. Customers must first enroll in CARE prior to participation in the PIPP.

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).

2.4.7 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 for all CARE residential customers. In addition, customers can view cost to date as well as historical usage information on My Account.

2.4.8 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 are actually enrolled in other program(s) as a result of these agreements).

In May 2000, CSD and SoCalGas entered into an agreement to streamline resources and program benefits, enhancing collaboration between CSD's LIHEAP and SoCalGas's CARE and GAF programs. In June 2000, SoCalGas integrated the toll-free telephone numbers for LIHEAP (and the ESA Program) into the CARE applications. Additionally, SoCalGas began offering CSD's toll-free number to customers inquiring about low-income assistance programs. These cooperative efforts persisted throughout 2023.

For PY2023, SoCalGas did not receive low-income customer information or requests for CARE data from CSD. SoCalGas maintained its collaboration with CSD by receiving LIHEAP payment data, which was utilized to apply LIHEAP assistance to eligible low-income customers' bills. For recipients of LIHEAP benefits, SoCalGas implemented an automated process that automatically PEV approves an account once a LIHEAP payment is posted to the account. Similarly, for customers benefiting from GAF, the placement of a GAF pledge on their account triggers automatic CARE PEV approval. This streamlined approach promotes efficient and seamless access to assistance programs for qualifying customers.

Through leveraging efforts, 2,536 customers who received LIHEAP payments and 2,266 customers who received a GAF pledge were automatically approved for CARE and exempt from PEV for one program enrollment cycle.

2.4.9 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. As of PY2022, scanning by RICOH 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 PY2023, RICOH delivered 263,978 scanned images to SoCalGas, including single page, multi-page and return applications.

SoCalGas processed over 164,000 mailed applications (i.e. system generated, direct mail, and bill inserts) in PY2023 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, SCE and PG&E CARE participant information

to enroll customers. In PY2023, 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 2023, SoCalGas continued to offer an invaluable, simplified method of immediate phone enrollment through CSRs, originally

implemented in February of 2018. In 2023, the Customer Contact Center successfully enrolled 122,314 customers in CARE.

In its pursuit for continued improvement in customer service, SoCalGas explored ways to expand the category of customers who are enrolled by a CSR, and not limit it to initial gas service turn-ons, back-ons, and payment arrangements. As of September 2023, the main Customer Contact Center now offers CARE enrollment to customers without limitation as standard procedure, resulting in 6,877 additional CARE enrollments via live CSR.

Mobile Home Park Utility Upgrade Program (MHPUUP):

Since program inception, 353 mobile home parks have converted from master-metered and sub-metered to direct utility service, impacting over 25,735 tenants. In 2023, 49 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 the 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 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 PY2023. CARE customers also have the option to opt-out of the program if they wish or no longer qualify. Once customers log into My Account, the message center alerts them of an option to apply for CARE to see if they qualify, or that they are due for recertification or PEV, depending on their real-time 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 and *Ways to Save* dropdown menu. From the CARE page, customers 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 immediately upon completing the application. In addition to confirmation messages within the page, automated confirmation emails are also sent to the applicant. 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 is also available for the My Account CARE page.

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 PY2023, SoCalGas processed a total of 155,798 applications received through My Account.

SoCalGas.com Website: Throughout PY2023, online applications were processed in real-time. 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.

The customer will then be taken to the same My Account CARE page without having to log into My Account, and has the ability to submit enrollments, recertifications, post-enrollment verifications or opt-outs. As of PY2022, PEV submission was made available to sub-metered customers and non-My Account users in English, Spanish, Chinese, Korean and Vietnamese through socalgas.com/careverification and the Spanish link socalgas.com/careverificacion. PEV submissions are sent from the web database to the CARE Operations group for processing. Mobile versioning and accessibility of the SoCalGas CARE website is an ongoing offering.

In PY2023, SoCalGas processed a total of 91,167 web applications. This capability has improved customer service and expedited enrollments and recertifications with instant processing.

2.4.10 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.

SoCalGas remained committed to targeting and engaging eligible households in low CARE penetration ZIP codes throughout 2023. These efforts resulted in a notable increase in program participation within these communities. However, SoCalGas recognized an opportunity for growth in its approach to customer retention, particularly concerning recertification and PEV completion. Acknowledging these challenges, SoCalGas shifted its focus in 2023 towards strengthening its CARE retention strategies. By doing so, SoCalGas aimed to

solidify its connections with its valued customers, allowing them to continue their participation uninterrupted. Looking ahead, SoCalGas will continue refining its retention efforts to sustain program participation and address its target demographics' specific challenges in these hard-to-reach areas.

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,[80] 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 a determined threshold or greater are granted automatic

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

CARE recertification for an additional two years. Those with a probability below the determined threshold are mailed a recertification request.

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

Several options for completing the recertification process are listed on the recertification application:

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

Recertification requires the tenant to provide the number of household occupants, total annual household income, or participation in a public assistance program. Applications received via postal service are opened, scanned, and validated for processing efficiency. Tenants are informed they have 90 days to respond to the recertification request, however, SoCalGas allows 100 days to account for weekends and non-business days. For tenants who have not responded to the recertification request within 45 days of the initial mailing, a second reminder is sent. Non-responsive tenants are removed from CARE. If the recertification is received and approved after the 90-day timeframe, the tenant is re-enrolled in CARE.

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

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

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

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

In PY2023, SoCalGas worked with 43 community partners, one (1) active capitation agency, as well as one (1) third-party outreach contractor to help eligible non-participating customers sign up for the CARE program. The CARE Capitation agency 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 PY2023, 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 PY2023, the number of customers enrolled in CARE by SoCalGas's CARE Capitation CBOs was 34 customers, and 13,604 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 PY2023.

2.7 Pilots

CARE PEV Live Outbound Call Pilot

D.21-06-015[81] 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 was to evaluate the efforts and resources to connect CARE customers with a live CARE representative over the phone to assist them to complete the PEV.

The pilot concluded in April 2023 and SoCalGas filed Advice Letter 6172 on July 31, 2023, outlining the pilot's results, costs and benefits, recommendations, lessons learned and best practices.[82] SoCalGas CSRs continue to perform outbound calls as needed as an existing best practice for PEVs.

[81] *See* D.21-06-015, OP 13.
[82] SoCalGas Advice Letter 6172 dated July 31, 2023.

2.8 Studies

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

D.21-06-015 requires the CHANGES program to be evaluated by an independent third-party with the first evaluation to begin no later than 12 months after Decision approval. The evaluation began in February 2022, with Opinion Dynamics as the selected evaluation consultant, and was conducted for the 2019-2021 program period. The evaluation study team consisted of representatives from the CPUC Consumer Affairs Branch, ED and the IOUs.

This process evaluation of the CHANGES program is designed to cover five key areas: Overall Performance, Data Collection, Program Value, Program Costs, Funding, and Program Operations and Structure. To address the study's objectives, a mixed-methods approach was employed to leverage existing data sources and collect new primary data. Primary data originated from in-depth interviews conducted with CPUC staff, IOUs, the program implementer, and select CBOs within the network managed by the program implementer. In addition, a mail survey was conducted with PY2021 program participants. The survey was made available in English and four other most common languages spoken by CHANGES customers, including Chinese, Spanish, Vietnamese, and Korean, and had a positive response rate of 8.8%.

Two public workshops were held prior to finalizing the draft research plan and draft final report, respectively, to gather stakeholder feedback and incorporate in

the final deliverables. Upon the completion of three research tasks – evaluability assessment, program costs and benefits assessment, and spatiotemporal distribution analysis, the evaluation resulted in the following conclusions and recommendations:[83]

- The CHANGES program is conducting activities aligned with its four stated objectives through program activities.
- Current data collection and tracking practices limit the ability of program implementers and stakeholders to understand the full impact of the program on LEP customers.
    - Specific recommendations include improving the accessibility, completeness, and quality of program tracking data, along with codifying metrics related to program activities, client characteristics, program referrals, and assistance outcomes among other areas.
- COVID-related budget impacts and demand fluctuations suggest that a longer time horizon is needed to comprehensively assess the basis for funding expansion.
- Program costs may not be fairly distributed across the IOUs, as indicated by the services provided in their territories. The traditional funding split of 30% PG&E, 30% SCE, 25% SoCalGas, and 15% SDG&E is not reflective of actual program activities, with PG&E receiving more services than it pays for.
- Data on the distribution of CBOs and program activity indicates the current model may have some weaknesses in ensuring adequate coverage in all areas of need, with underserved areas located within and outside of IOU territories.

Additionally, the study determined that based on the services provided and the customers who benefit, funding the CHANGES program through the CARE budget is appropriate as compared to the general rate case (GRC).

[83] PY2019-2021 CHANGES Program Evaluation - Final Report. June 2023. https://www.calmac.org/publications/CHANGES_Evaluation_Report__CALMAC.pdf

2.9 CARE Working Groups and Sub-working Groups (SWG) CARE/FERA PEV SWG

Please see Section 1.10.2 above for a description of the CARE/FERA PEV SWG and its activities.

2.10 Miscellaneous

2.10.1 Describe efforts contained in Attachment 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 Stipulation[84] 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

[84] *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.

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 2023, CETF was promoted on SoCalGas's website (socalgas.com/Assistance and socalgas.com/Asistencia) and via monthly CARE emails to residential customers. In addition to promoting CETF via marketing channels, SoCalGas includes CETF information in ongoing CBO training presentations. SoCalGas will continue to cross-promote affordable broadband messaging when relevant and appropriate.

2.10.2 CARE Probability Model Updates

SoCalGas has been continuously monitoring, evaluation and improving its probability model performance. A new probability model was developed and productionalized in February 2023. As the product of Machine Learning Model Operations, the model enables continuous learning of historical CARE customer verification outcomes. A variety of automation methods were applied to implement the model for operations.

Compared to the last model implemented in August 2021, the new model features include: 1) 18 factors added covering source channels, payment behaviors, enrolled programs and household information; and 2 factors removed due to statistical insignificance (WIC Program and number of overdue notices); 2) the model was retrained using the latest complete historical data with 2.1 million historical CARE accounts; 3) a boost in model accuracy from 0.68 to 0.74 (model

performance is considered solid when accuracy is above 0.7); 4) model auto refresh enabled to provide best-fitting parameters automatically.

During the 2023 winter storms and unprecedented high bills season that SoCalGas experienced, SoCalGas observed a spike in the number customers requested for PEV due to one of the variables: 12 Month Average Bill Amount which has resulted in overall low p-scores. As a result, CARE placed a daily limit on number of CARE customers selected for PEV and recertification to remain in compliance with D.12-08-044.

SoCalGas monitors and revisits the model annually at a minimum. Should any CARE eligibility factors be affected, including addition or removal of certain CE programs or other aspects of the model, it becomes necessary to retrain and refresh the CARE model to maintain model integrity.

SoCalGas CARE Probability Model - Productionized February 27, 2023.

Below are the customer characteristics used in the algorithm:

Probability Model Factors (in order of significance)	**Positive or Negative Score Impact**	**Included in February 2023 model**	**Included in the August 2021 model**
Fix Income Customer	+	Yes	Yes
Category eligible	+	Yes	Yes
Enrollment Source: door-to-door	-	Yes	No
Enrollment Source: web	+	Yes	No
LIHEAP program	+	Yes	Yes

Enrollment Source: marketing by mail	-	Yes	No
Enrollment Source: branch office	-	Yes	No
Living in multiple units	+	Yes	Yes
Income eligible	+	Yes	Yes
Food Stamps program	+	Yes	Yes
Enrollment Source: phone	+	Yes	No
Household number	+	Yes	Yes
Medical Baseline program	+	Yes	No
Level Pay Plan program	-	Yes	No
Payment extension program	+	Yes	No
Whether de-enrolled previously	+	Yes	Yes
Medi-Cal program	+	Yes	Yes
Enrollment Source: auto-enrollment	+	Yes	No
Cash Only program	+	Yes	No
Prizm: young low income	+	Yes	Yes
Prizm: family low income	+	Yes	Yes
Prizm: mature low income	+	Yes	Yes
Years since first-time CARE enrollment	-	Yes	Yes
Line Item Billing program	+	Yes	No
Paperless program	-	Yes	Yes
Prizm: young high income	-	Yes	Yes
Prizm: mature high income	-	Yes	Yes
Average gas usage amount	-	Yes	Yes
Special Ledger program	+	Yes	No
Average gas usage in winter	+	Yes	No
Payment extension in the last 12 months	+	Yes	Yes
House square feet	-	Yes	No
My Account program	-	Yes	No
Income	-	Yes	Yes
Payment method volatility	+	Yes	No
Payment method	-	Yes	No
Homeowner	-	Yes	No
WIC Program		No	Yes
No. of overdue notices in the last 12 months		No	Yes

3. CARE EXPANSION PROGRAM

3.1 Participant Information

3.1.1 Provide the total number of residential and/or commercial facilities by energy source by month 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 33,142 residents in the non-residential CARE Expansion Program facilities, comprised of 772 primary facilities with 10,125 associated satellite facilities, and 50 farmworker housing facilities participating in the CARE Expansion Program at PY2023 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 $1,277.35 in marketing expenses for approximately 16,500 CARE Non-Profit Group Living (NPGL) facilities bill inserts in PY2023. Due to the number of participants, SoCalGas did not track administrative labor costs for new CARE Expansion applications received during PY2023.

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 PY2023 was $149.82.[85]

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 PY2023 was $925.86.[86]

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 PY2023, Chavez Radio Group provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers

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

in their workplaces. Food, musical entertainment, and information from SoCalGas regarding the CARE program are part of these lunch break sessions.

SoCalGas used a variety of channels to increase awareness of the CARE program in 2023. Among those channels were agricultural workers and those living in commercial facilities. In September 2023, SoCalGas also sent out a bill insert to approximately 16,500 eligible customers. This bill insert described the CARE rate for the expansion program. SoCalGas continued to leverage 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 Discuss the most effective outreach method, including a discussion of how success is measured.

In 2023, the SoCalGas SPOC and SoCalGas CARE teams collaborated closely in further expanding multi-property portfolio ownership group enrollments. SoCalGas SPOCs continued to use the streamlined CARE application/enrollment process to increase affordable property participation. Feedback from participating affordable housing portfolio owners continued to be very positive. During the year, the SPOCs were able to deliver CARE program enrollments for 12 MF Group Living Properties with over 400 total units.

3.4.3 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 PY2023.

3.4.4 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 PY2023. 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.

3.4.5 Discuss any recommendations to improve the cost-effectiveness, application processing, 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 and beginning in 2021, the IOUs implemented a four-year recertification process. As a result, these facilities were not formally requested to recertify in 2023. However, 247 facilities automatically submitted all of the necessary documentation and were recertified in 2023.

Per D.21-06-015, these 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 systematically 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 PY2023.

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 11 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 PY2023 is in compliance with fund shifting rules as laid out in D.21-06-015.

5. COMMONLY USED ACRONYMS

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 Development
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

ESA WG	Energy Savings Assistance Program Working Group
eTRM	Electronic Technical Reference Manual
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
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIOB	Low Income Oversight Board
MBL	Medical Baseline Allowance
ME&O	Marketing Education & Outreach
MF	Multifamily
MFWB	Multifamily Whole Building
M&O	Marketing & Outreach
NEI	Non-energy Impact
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
PATH	People Assisting the Homeless
PBI	Performance Based Incentive
PEV	Post Enrollment Verification
PDA	Public Document Area
PG&E	Pacific Gas and Electric Company
POA	Property Owner Authorization

PP	Policies & Procedures
PY	Program Year
RFP	Request for Proposal
SB	Senate Bill
SCE	Southern California Edison Company
SDG&E	San Diego Gas & Electric Company
SEC	Service Establishment Charge
SoCalGas	Southern California Gas Company
SPOC	Single Point of Contact
SWG	Sub-working 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 - Program Expenses – ESA Main

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 – Pilot Plus and Pilot Deep

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 - Energy Rate Used for Bill Savings Calculations

ESA Program- Table 10 - Bill Savings Calculations by Program Year

ESA Program- Table 11 - Fund Shifting

ESA Program- Table 12 - Categorical and Other Enrollment

ESA Program- Table 13A - Leveraging & Integration

ESA Program – Table 13B Clean Energy Referral, Leveraging and Coordination

ESA Program – Table 14 - Expenditures for Pilots and Studies

ESA Program – Table 15 - Tribal Outreach

ESA Program – Table 16 – 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 14 - Customer Usage and ESA Program Treatment

CARE Table 15 - Categorical Enrollment

CARE Table 16 – CARE and Disadvantaged Community Enrollment

6.3 Tribal Outreach Contacts[87]

[87] Because Section 6.3, Tribal Outreach Contacts, which was included in the original Annual Report (subject to SoCalGas's Motion for Leave to File Under Seal filed on May 1, 2024) is not being amended, it is not included in this Amended Report.

Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
PY 2023* Summary Highlights
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

2023 Energy Savings Assistance Program Summary			
2023	**Authorized / Planning Assumptions**	**Actual**	**%**
Budget [1]	$122,824,704	$ 80,121,167	65%
Funded from 2009-2016 Unspent Funds [2]	$8,001,130	$ 4,008,225	50%
Summary Homes Treated	69,837	56,058	80%
Summary kWh Saved	N/A	N/A	N/A
Summary kW Demand Reduced	N/A	N/A	N/A
Summary Therms Saved [3]	1,435,220	1,223,807	85%

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[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.

[3] Per D.21-06-015, authorized thems saved goal is for the entire portfolio with the exception of Pilot Plus/Pilot Deep.

2023 CARE Program Summary			
2023	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 10,181,364	$ 9,062,389	89%
Subsidies	$ 136,819,016	$ 263,781,436	193%
Service Establishment Charge	$ 3,982,900	$ 2,523,721	63%
Total Program Costs and Discounts	**$ 150,983,280**	**$ 275,367,546**	182%
2023 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Categorically Eligible**	**Self Certified as Income Eligible**
Method	75,648	155,645	111,460
2023 CARE Enrollment	**Estimated Eligible Participants**	**Participants**	**Enrollment Rate**
Total Enrolled	1,675,824	1,836,582	110%

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

PY 2023* Low Income Annual Report
ESA Program Summary
Expenses and Energy Savings by Program
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

ESA Expense Summary

	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
ESA Main Program (SF, MH, MF In-Unit)[1, 2]	N/A	$ 94,836,845	$ 94,836,845	N/A	$ 79,536,635	$ 79,536,635	N/A	84%	84%
ESA Multifamily Common Area Measures	N/A	$ 8,001,130	$ 8,001,130	N/A	$ 4,008,225	$ 4,008,225	N/A	50%	50%
ESA Multifamily Whole Building [3, 6]	N/A	$ 21,477,314	$ 21,477,314	N/A	$ 148,883	$ 148,883	N/A	1%	1%
ESA Pilot Plus and Pilot Deep [6]	N/A	$ 6,510,545	$ 6,510,545	N/A	$ 435,649	$ 435,649	N/A	7%	7%
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**	**$ 130,825,834**	**$ 130,825,834**	**$ -**	**$ 84,129,392**	**$ 84,129,392**	**N/A**	64%	64%

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[1] Budget for PY 2023 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] MFWB administed by SDG&E. No treatments completed in 2023.
[4] Applicable to SCE only.
[5] Applicable to electric utilities only.
[6] Includes only expenses verified in SoCalGas SAP. Other expenses incurred recorded by SDG&E for MFWB and SCE for Pilot Plus/Deep.

ESA Energy Savings Summary

	Authorized / Forecasted Planning Assumptions			Year to Date Actual			%		
ESA Program:	**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	1,149,176	N/A	N/A	80%
ESA Multifamily Common Area Measures	N/A	N/A	N/A	N/A	N/A	74,631	N/A	N/A	0%
ESA Multifamily Whole Building [3]	N/A	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	249	N/A	N/A	0%
CSD Leveraging	N/A	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	N/A	N/A	0%
Clean Energy Homes New Construction Pilot [4]	N/A	N/A	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**	**1,224,056**	**N/A**	**N/A**	85%

[1] Authorized/forecasted planning assumption is for entire portfolio, less Pilot Plus/Pilot Deep
[2] The ESA Multifamily In-Unit energy and demand savings are included in the ESA Main Program category.
[3] MFWB administered by SDE&E. No treatments completed in 2023.
[4] Applicable to SCE only.

PY 2023* Low Income Programs Annual Report
ESA Program Table 1
Main ESA Program (SF, MH MF In-unit) Expenses
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

	2023 Authorized Budget [1]			2023 Annual Expenses [2]			% of Budget Spent		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency									
Appliances	N/A			N/A	$ 1,059,404	$ 1,059,404	N/A		
Domestic Hot Water	N/A			N/A	$ 16,730,811	$ 16,730,811	N/A		
Enclosure	N/A			N/A	$ 14,468,737	$ 14,468,737	N/A		
HVAC	N/A			N/A	$ 17,671,829	$ 17,671,829	N/A		
Maintenance	N/A			N/A	$ 9,557,176	$ 9,557,176	N/A		
Lighting	N/A			N/A	$ -	$ -	N/A		
Miscellaneous [4]	N/A			N/A	$ 1,349,135	$ 1,349,135	N/A		
Customer Enrollment	N/A			N/A	$ 7,141,965	$ 7,141,965	N/A		
In Home Education	N/A			N/A	$ 936,292	$ 936,292	N/A		
Pilot [3]	N/A			N/A	$ -	$ -	N/A		
Energy Efficiency TOTAL	N/A	**$ 82,837,720**	**$ 82,837,720**	N/A	**$ 68,915,349**	**$ 68,915,349**	N/A	**83%**	**83%**
Training Center	N/A	$ 777,697	$ 777,697	N/A	$ 622,881	$ 622,881	N/A	80%	80%
Workforce Education and Training	N/A	$ -	$ -	N/A			N/A	0%	0%
Inspections	N/A	$ 1,510,696	$ 1,510,696	N/A	$ 1,368,214	$ 1,368,214	N/A	91%	91%
Marketing and Outreach	N/A	$ 1,398,505	$ 1,398,505	N/A	$ 1,377,599	$ 1,377,599	N/A	99%	99%
Statewide Marketing Education and Outreach	N/A	$ -	$ -	N/A			N/A	0%	0%
Studies	N/A	$ 262,500	$ 262,500	N/A	$ 57,394	$ 57,394	N/A	22%	22%
Regulatory Compliance	N/A	$ 472,833	$ 472,833	N/A	$ 419,000	$ 419,000	N/A	89%	89%
General Administration	N/A	$ 7,478,835	$ 7,478,835	N/A	$ 6,704,870	$ 6,704,870	N/A	90%	90%
CPUC Energy Division	N/A	$ 98,059	$ 98,059	N/A	$ 71,328	$ 71,328	N/A	73%	73%
Administration Subtotal	**N/A**	**$ 11,999,125**	**$ 11,999,125**	**N/A**	**$ 10,621,286**	**$ 10,621,286**	**N/A**	**89%**	**89%**
TOTAL PROGRAM COSTS	N/A	**$ 94,836,845**	**$ 94,836,845**	N/A	**$ 79,536,635**	**$ 79,536,635**	N/A	**84%**	**84%**
Funded Outside of ESA Program Budget									
Indirect Costs					$ 4,200,878	$ 4,200,878			
NGAT Costs					$ 1,156,213	$ 1,156,213			

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[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

[4] Miscellaneous includes Performance Based Incentive (PBI) costs.

PY 2023* Low Income Programs Annual Report

ESA Program Table 2

Main ESA Program (SF, MH, MF In-unit) Expenses and Energy Savings by Measure Installed

SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Main ESA Program Total
2023 Completed & Expensed Installation

Measures [8]	Basic	Plus	Units	Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses ($)	% of Expenditure	Effective Useful Life (Years)	2023 Total Measure Life Cycle Bill Savings
Appliances											
High Efficiency Clothes Washer		X	Home	785			15,559	$ 793,068	1.2%	11	$ 237,902
Refrigerators		N/A	Each	-			-	$ -	0.0%	-	$ -
Freezers		N/A	Each	-			-	$ -	0.0%	-	$ -
Clother Dryer		N/A	Each	-			-	$ -	0.0%	-	$ -
Dishwasher		N/A	Each	-			-	$ -	0.0%	-	$ -
Domestic Hot Water											
Other Domestic Hot Water [2]			Home	51,594			163,037	$ 3,069,918	4.7%	10	$ 2,266,215
Water Heater Tank and Pipe Insulation [3]		X	Home	23,094			146,647	$ 864,942	1.3%	9	$ 1,834,553
Water Heater Repair/Replacement		X	Home	12,627			30,179	$ 6,088,122	9.3%	11	$ 461,430
Tankless Water Heater - NEW		X	Home	436			39,080	$ 1,678,600	2.6%	20	$ 1,086,430
Thermostatic Shower Valve			Each	52,264			85,190	$ 2,684,776	4.1%	10	$ 1,184,145
Combined Showerhead/TSV			Each	-			-	$ -	0.0%	-	$ -
Heat Pump Water Heater		N/A	Each	-			-	$ -	0.0%	-	$ -
Tub Diverter/ Tub Spout			Each	12,222			68,688	$ 1,576,286	2.4%	10	$ 954,758
Solar Water Heating		X	Home	-			-	$ -	0.0%	-	$ -
Enclosure											
Air Sealing/Envelope [4]		X	Home	32,737			16,171	$ 4,016,812	6.2%	11	$ 247,255
Diagnostic Air Sealing		N/A	Home	-			-	$ -	0.0%	-	$ -
Attic Insulation		X	Home	4,786			136,443	$ 10,290,883	15.8%	20	$ 3,793,117
Floor Insulation		N/A	Home	-			-	$ -	0.0%		$ -
Minor Home Repairs			Home	-			-	$ -	0.0%	-	$ -
HVAC [7]											
Furnace Repair/Replacement		X	Home	1,287			(4,507)	$ 3,903,126	6.0%	20	$ (125,292)
Room A/C Replacement		N/A	Home	-			-	$ -	0.0%	-	$ -
Central A/C Replacement		N/A	Home	-			-	$ -	0.0%	-	$ -
Heat Pump Replacement		N/A	Home	-			-	$ -	0.0%	-	$ -
Evaporative Cooler		N/A	Home	-			-	$ -	0.0%	-	$ -
Duct Testing and Sealing		X	Home	951			8,310	$ 661,568	1.0%	3	$ 34,654
Energy Efficient Fan Control		N/A	Home	-			-	$ -	0.0%	-	$ -
Prescriptive Duct Sealing		X	Home	24,507			272,273	$ 2,995,679	4.6%	3	$ 1,135,377
High Efficiency Forced Air Unit (HE FAU) - Early Replacement		X	Home	-			-	$ -	0.0%		$ -
High Efficiency Forced Air Unit (HE FAU) - On Burnout		X	Home	1,492			27,469	$ 5,694,264	8.7%	20	$ 763,636
Smart Thermostat		X	Home	12,067			70,038	$ 3,193,081	4.9%	9	$ 876,175
Portable A/C		N/A	Each	-			-	$ -	0.0%	-	$ -
Central Heat Pump-FS (propane or gas space)		N/A	Home	-			-	$ -	0.0%	-	$ -
Wholehouse Fan		N/A	Home	-			-	$ -	0.0%	-	$ -
Smart Fan Controller - NEW		X	Home	2,843			77,677	$ 464,190	0.7%	6.7	$ 723,404
Maintenance											
Furnace Clean and Tune		X	Home	2,502			(3,077)	$ 242,960	0.4%	20	$ (85,553)
Central A/C Tune up		N/A	Home	-			-	$ -	0.0%	-	$ -
Evaporative Cooling Maintenance		N/A	Home	-			-	$ -	0.0%	-	$ -
Range Hood		X	Home	-			-	$ -	0.0%	-	$ -
Lighting											
Exterior Hard wired LED fixtures		N/A	Each	-			-	$ -	0.0%	-	$ -
LED Reflector Bulbs		N/A	Each	-			-	$ -	0.0%	-	$ -
LED A-Lamps		N/A	Each	-			-	$ -	0.0%	-	$ -
Miscellaneous											
Pool Pumps		N/A	Home	-			-	$ -	0.0%	-	$ -
Smart Strip Tier I		N/A	Home	-			-	$ -	0.0%	-	$ -
Smart Strip Tier II		N/A	Each	-			-	$ -	0.0%	-	$ -
Air Purifier		N/A	Home	-			-	$ -	0.0%	-	$ -
Cold Storage		N/A	Each	-			-	$ -	0.0%	-	$ -
Comprehensive Home Health and Safety Check-up		X	Home	35,429			-	$ 2,263,527	3.5%	-	$ -
CO and Smoke Alarm		X	Home	31,580			-	$ 7,003,382	10.7%	-	$ -
Pilots											
Customer Enrollment											
Outreach & Assessment			Home	71,031				$ 6,770,270	10.4%		
In-Home Energy Education			Home	61,683				$ 984,653	1.5%		
Total Savings/Expenditures [5]							1,149,176	$ 65,240,106			
Total Households Weatherized [6]				56,058							

Households Treated			Total	
- Single Family Households Treated			Home	49,358
- Multi-family Households Treated (In-unit)			Home	2,813
- Mobile Homes Treated			Home	3,887
Total Number of Households Treated			Home	56,058
# Eligible Households to be Treated for PY			Home	69,837
% of Households Treated			%	80%
- Master-Meter Households Treated			Home	2,021

	Actual Expenses		
ESA Program - Main	**Electric**	**Gas**	**Total**
Administration	$ -	$ 10,621,286	$ 10,621,286
Direct Implementation (Non-Incentive)	$ -	$ -	$ -
Direct Implementation	$ -	$ 68,915,349	$ 68,915,349
TOTAL ESA Main COSTS	$ -	$ 79,536,635	$ 79,536,635

<<Includes measures costs

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[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] Savings for HVAC measures vary by Climate Zone and are averaged.

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

PY 2023 Low Income Programs Annual Report
ESA Program Table 2A
Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measure Installed
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

ESA Program - Multifamily Common Area Measures [1]

2023 Completed & Expensed Installation

ESA CAM Measures [2]	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	Effective Useful Life (Years)	2023 Total Measure Life Cycle Bill Savings
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	34				3,400	$ 1,129,102	28.2%	11	$ 51,986
Central Boiler Replace**	Cap-kBTUh	37				71,231	$ 2,870,288	71.8%	20	$ 1,980,222
Envelope										
Air Sealing/Envelope [4]	Home	-	-	-	-	-	$ -	0.0%	-	$ -
Attic Insulation	Home	-	-	-	-	-	$ -	0.0%	-	$ -
HVAC [12]										
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%	-	$ -
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	-	71	-	-	-	74,631	$ 3,999,390			

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [8]	18
Subtotal of Master-metered Multifamily Properties Treated	18
Total Number of Multifamily Tenant Units w/in Properties Treated [9]	5,793
Total Number of buildings w/in Properties Treated	218

	Actual Expenses		
ESA Program - Multifamily Common Area	**Electric**	**Gas**	**Total**
Administration	$ -	$ 130,772	$ 130,772
Direct Implementation (Non-Incentive)	$ -	$ -	$ -
Direct Implementation	$ -	$ 3,877,453	$ 3,877,453
TOTAL MF CAM COSTS	$ -	$ 4,008,225	$ 4,008,225

<<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. MF CAM concluded June 30, 2023.
[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 2A.
[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.
[12] Savings for HVAC measures vary by Climate Zone and are averaged. FN added per ED

PY 2023 Low Income Programs Annual Report
ESA Program Table 2B
Multifamily Whole Building Expenses and Energy Savings by Measure Installed
SOUTHERN CALIFORNIA GAS COMPANY

	ESA Program - Multifamily Whole Building Measures [1]										
	2023 Completed & Expensed Installation										
Measures [2][3]	Units of Measure (such as "each")	Measure Type (In-unit vs CAM/WB) [8]	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditure	Effective Useful Life (Years)	2023 Total Measure Life Cycle Savings
Appliances											
High Efficiency Clothers Washer	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Refrigerators	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Domestic Hot Water											
New: Non-Condensing Domestic Hot Water Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
New: Condensing Domestic Hot Water Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Storage Water Heater	Cap-kBtuh	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Tankless Water Heater	Cap-kBtuh	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Water Heater	kW	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Demand Control DHW Recirculation Pump	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Low flow Showerhead	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Faucet Aerator	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Other Hot Water	Home	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Thermostatic Tub Spout/Diverter	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Water Heater Tank and Pipe Insulation	Home	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Water Heater Repair/Replacement	Home	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Water Heater	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Hot Water Pipe Insulation	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Boiler Controls	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Envelope											
Whole Building Attic Insulation	Sq Ft	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Wall Insulation Blow-in	Sq Ft	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Windows	Sq Ft	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Window Film	Sq Ft	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Air Sealing	Home	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Attic Insulation	Home	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
HVAC [9]											
Air Conditioners Split System	Cap-Tons	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Split System	Cap-Tons	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
New: Packaged Air Conditioner	Cap-Tons	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Package Terminal A/C	Cap-Tons	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Package Terminal Heat Pump	Cap-Tons	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Furnace Replacement	Cap-kBtuh	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Space Heating Boiler	Cap-kBtuh	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Smart Thermostats	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Furnace Repair/Replacement	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Central A/C Replacement	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
High Efficiency Forced Air Unit (HE FAU)	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Portable A/C	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Central A/C Tune up	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Prescriptive Duct Sealing	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Duct Sealing	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Blower Motor Retrofit	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Efficient Fan Controller	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Lighting											
Interior LED Lighting	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Interior TLED Type A Lamps	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Interior TLED Type C Lamps	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
New: LED T8 Lamp - Interior	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
New: LED T8 Lamp - Exterior	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Interior LED Fixture	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Interior LED Screw-in	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Interior LED Exit Sign	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Exterior LED Lighting	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
New: LED Parking Garage Fixtures	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
LED Exterior Wall or Pole Mounted Fixture	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
LED Corn Lamp for Exterior Wall or Pole Mounted	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Exterior LED Lighting - Pool	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Wall or Ceiling Mounted Occupancy Sensor	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
LED Diffuse A-Lamps	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
LED Reflector Bulbs	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Miscellaneous											
Tier-2 Smart Power Strip	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Variable Speed Pool Pump	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Smart Power Strip Tier II	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Cold Storage	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Air Purifier	Home	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
CO and Smoke Alarm	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
CO and Smoke Alarm	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Minor Repair	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Electrification											
New - Central Heat Pump-FS (propane or gas space)	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Clothes Dryer - FS	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Induction Cooktop - FS	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Ductless Mini-split Heat Pump - FS	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Water Heater - FS	Each	In-Unit	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Pool Heater - FS	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Ductless Mini Split - FS	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Water Heater - FS	Each	CAM/WB	-	-	-	-	-	$ -	0.0%	-	$ -
Customer Enrollment - In Unit											
ESA Outreach & Assessment	Home	In-Unit	-					$ -	0.0%		
ESA In-Home Energy Education	Home	In-Unit	-					$ -	0.0%		
Ancillary Services											
Audit [5]			-	-	-	-	-	$ -	0.0%		
Total	-		-	-	-	-	-	$ -	0.0%		

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated [6]	-
Subtotal of Master-metered Multifamily Properties Treated	-
Total Number of Multifamily Tenant Units w/in Properties Treated [7]	-
Total Number of Buildings w/in Properties Treated	-

Multifamily Households Treated (In-Unit)	Number
Total Number of Households Individually Treated	-

	Actual Expenses		
ESA Program - MFWB	Electric	Gas	Total
Administration	$ -	$ 148,883	$ 148,883
Direct Implementation (Non-Incentive)	$ -	$ -	$ -
Direct Implementation	$ -	$ -	$ -
SPOC [10]	$ -	$ 36,874	$ 36,874
TOTAL MFWB COSTS [11]	$ -	$ 148,883	$ 148,883

<<Includes measures costs

Note: No homes treated in 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] 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.
[6] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.
[7] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.
[8] Measure type column added to identify if a measure is for in-unit or common area/whole building because they use different workpaper savings.
[9] Savings for HVAC measures vary by Climate Zone and are averaged.
[10] Costs related to MFWB but not accounted for in ESA budget
[11] Includes only ESA MFWB costs verified in SAP.

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ESA Program Table 2C
Expenses and Energy Savings by Measure Installed - Pilot Plus and Pilot Deep
SOUTHERN CALIFORNIA GAS COMPANY

SoCalGas and SCE combined results

		ESA Program - Pilot Plus[1]							
		2023 Completed & Expensed Installation							
Measures	Units	Quantity Installed	kWh (Annual) [3]	kW (Annual) [3]	Therms (Annual) [3]	Expenses ($)	% of Expenditure	Effective Useful Life (years)	2023 Total Measure Life Cycle Bill Savings
Appliances									
Energy Star Chest Freezer: 14-18 cf	Each						0%		
Energy Star Chest Freezer: 20-22 cf	Each						0%		
Energy Star Chest Freezer: 5-9 cf	Each						0%		
Energy Star Qualified Clothes Washer	Each						0%		
HP Washer/Dryer Combo Unit	Each						0%		
Energy Star Qualified Dishwashers	Each						0%		
Energy Star Qualified Refrigerators - Large 20+ cf	Each						0%		
Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each						0%		
Energy Star Qualified Refrigerators - Small 14-16 cf	Each						0%		
Energy Star Upright Freezer: 13.5-15 cf	Each						0%		
Energy Star Upright Freezer: 16-18 cf	Each						0%		
Energy Star Upright Freezer: 20-22 cf	Each						0%		
Cooling Measures									
Energy Star Qualified Ceiling Fans	Each						0%		
Whole House Fan	Each						0%		
Evaporative cooler installation 3,000 CFM	Each						0%		
Evaporative cooler installation 4,000 CFM	Each						0%		
Evaporative cooler installation 5,000 CFM	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 10k BTU	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 12k BTU	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 15k BTU	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 6-8k BTU	Each						0%		
Domestic Hot Water									
Faucet Aerator	Each						0%		
Low-Flow Showerhead - Handheld	Each						0%		
Low-Flow Showerhead - Regular	Each						0%		
Replace existing electric W/H with HP Water Heater - 40G	Each						0%		
Replace existing electric W/H with HP Water Heater - 50G	Each						0%		
Replace existing electric W/H with HP Water Heater - 80G	Each						0%		
Replace with Solar Water Heating w/storage back up	Each						0%		
Replace with Solar Water Heating w/tankless back up	Each						0%		
Replace with Tankless Water Heater	Each						0%		
Thermostatic Shower Valve	Each						0%		
Thermostatic Tub Spout/Diverter	Each						0%		
Water Heater - Repair water leak - NTE $300	T&M						0%		
Water Heater Blanket	Each						0%		
Water Heater Pipe Insulation	Each						0%		
Enclosure									
Attic Cover Replacement	Each						0%		
Attic Insulation, Add R-11	Per Square Foot						0%		
Attic Insulation, Add R-19	Per Square Foot						0%		
Attic Insulation, Add R-30	Per Square Foot						0%		
Attic Insulation, Add R-38	Per Square Foot						0%		
Attic Insulation, Add R-49	Per Square Foot						0%		
Caulking	Per Linear Foot						0%		
Cover Plate Gaskets	Per Home						0%		
Duct Sealing - 120 Minutes	Per System						0%		
Duct Sealing - 60 Minutes	Per System						0%		
Duct Sealing - 90 Minutes	Per System						0%		
Floor Insulation, Add R-19	Per Square Foot						0%		
Glass Replacement	Per Square Foot						0%		
High Efficiency Windows	Per Square Foot						0%		
High-Performance Cool Roofs	Per Square Foot						0%		
Insulated Exterior Doors	Per Door						0%		
Kitchen Exhaust Dampers	Each						0%		
Minor Home / Envelop Repairs - NTE $600	T&M						0%		
Prescriptive Duct Sealing (No HVAC Replacement)	Per System						0%		
Radiant Barriers	Per Square Foot						0%		
Room AC/Evaporative Cooler Cover	Each						0%		
Wall Insulation, Add R-13	Per Square Foot						0%		
Weather-stripping	Per Linear Foot						0%		
Window Film (Tint)	Per Square Foot						0%		
HVAC [4]									
Duct Insulation (R-6)	Per Linear Foot						0%		
Duct Repair	Each						0%		
Duct Replacement	Per Linear Foot						0%		
Duct Test - Title 24 or to perform duct sealing	Per System						0%		
ECM Blower Motor	Each						0%		
Efficient Fan Controller	Each						0%		
HE Wall Furnace 82% AFUE	Each						0%		
HVAC System - Filter Replacement (No HVAC Replacement)	Each						0%		
HVAC Tune-up	Each						0%		
Mobile Home Split System, 2 TON 16 SEER/60 KBTU 95% AFUE	Each						0%		
Mobile Home Split System, 2 TON 16 SEER/75 KBTU 95% AFUE	Each						0%		
Mobile Home Split System, 3 TON 16 SEER/60 KBTU 95% AFUE	Each						0%		

		ESA Program - Pilot Deep [2]							
		2023 Completed & Expensed Installation							
Measures	Units	Quantity Installed	kWh (Annual) [3]	kW (Annual) [3]	Therms (Annual) [3]	Expenses ($)	% of Expenditure	Effective Useful Life (years)	2023 Total Measure Life Cycle Bill Savings
Appliances									
Energy Star Chest Freezer: 14-18 cf	Each						0%		
Energy Star Chest Freezer: 20-22 cf	Each						0%		
Energy Star Chest Freezer: 5-9 cf	Each						0%		
Energy Star Qualified Clothes Washer	Each	1	85.2	0.014	9.41	$ 1,090	3%	11	$ 349
HP Washer/Dryer Combo Unit	Each						0%		
Energy Star Qualified Dishwashers	Each						0%		
Energy Star Qualified Refrigerators - Large 20+ cf	Each	1	22.9	0.005	0.621	$ 980	3%	14	$ 83
Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each	1	47.4	0.000	-0.66	$ 1,365	4%	14	$ 133
Energy Star Qualified Refrigerators - Small 14-16 cf	Each	1	40.8	0.000	-0.61	$ 1,300	4%	14	$ 114
Energy Star Upright Freezer: 13.5-15 cf	Each						0%		
Energy Star Upright Freezer: 16-18 cf	Each						0%		
Energy Star Upright Freezer: 20-22 cf	Each						0%		
Cooling Measures									
Energy Star Qualified Ceiling Fans	Each						0%		
Whole House Fan	Each						0%		
Evaporative cooler installation 3,000 CFM	Each						0%		
Evaporative cooler installation 4,000 CFM	Each						0%		
Evaporative cooler installation 5,000 CFM	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 10k BTU	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 12k BTU	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 15k BTU	Each						0%		
Replace Room AC with Energy Start Qualified RAC - 6-8k BTU	Each						0%		
Domestic Hot Water									
Faucet Aerator	Each						0%		
Low-Flow Showerhead - Handheld	Each						0%		
Low-Flow Showerhead - Regular	Each						0%		
Replace existing electric W/H with HP Water Heater - 40G	Each	1	0	0	31.70	$ 2,540	7%	11	$ 612
Replace existing electric W/H with HP Water Heater - 50G	Each						0%		
Replace existing electric W/H with HP Water Heater - 80G	Each						0%		
Replace with Solar Water Heating w/storage back up	Each						0%		
Replace with Solar Water Heating w/tankless back up	Each	1	0	0	198.46	$ 8,280	24%	20	$ 5,478
Replace with Tankless Water Heater	Each						0%		
Thermostatic Shower Valve	Each						0%		
Thermostatic Tub Spout/Diverter	Each						0%		
Water Heater - Repair water leak - NTE $300	T&M						0%		
Water Heater Blanket	Each						0%		
Water Heater Pipe Insulation	Each						0%		
Enclosure									
Attic Cover Replacement	Each						0%		
Attic Insulation, Add R-11	Per Square Foot						0%		
Attic Insulation, Add R-19	Per Square Foot						0%		
Attic Insulation, Add R-30	Per Square Foot						0%		
Attic Insulation, Add R-38	Per Square Foot	1,246	0.01	0	0.03	$ 2,492	7%	20	$ 1,084
Attic Insulation, Add R-49	Per Square Foot						0%		
Caulking	Per Linear Foot	3	0	0	0	$ 4	0%	10	$ -
Cover Plate Gaskets	Per Home	2	0	0	0	$ 35	0%	0	$ -
Duct Sealing - 120 Minutes	Per System	2	0.29	0.00004	0.05	$ 730	2%	0	$ -
Duct Sealing - 60 Minutes	Per System						0%		
Duct Sealing - 90 Minutes	Per System						0%		
Floor Insulation, Add R-19	Per Square Foot						0%		
Glass Replacement	Per Square Foot						0%		
High Efficiency Windows	Per Square Foot						0%		
High-Performance Cool Roofs	Per Square Foot						0%		
Insulated Exterior Doors	Per Door						0%		
Kitchen Exhaust Dampers	Each						0%		
Minor Home / Envelop Repairs - NTE $600	T&M						0%		
Prescriptive Duct Sealing (No HVAC Replacement)	Per System						0%		
Radiant Barriers	Per Square Foot						0%		
Room AC/Evaporative Cooler Cover	Each						0%		
Wall Insulation, Add R-13	Per Square Foot						0%		
Weather-stripping	Per Linear Foot	5	0	0	0	$ 27	0%	15	$ -
Window Film (Tint)	Per Square Foot						0%		
HVAC									
Duct Insulation (R-6)	Per Linear Foot						0%		
Duct Repair	Each						0%		
Duct Replacement	Per Linear Foot						0%		
Duct Test - Title 24 or to perform duct sealing	Per System	2	0	0	0	$ 280	1%	0	$ -
ECM Blower Motor	Each						0%		
Efficient Fan Controller	Each						0%		
HE Wall Furnace 82% AFUE	Each						0%		
HVAC System - Filter Replacement (No HVAC Replacement)	Each						0%		
HVAC Tune-up	Each						0%		
Mobile Home Split System, 2 TON 16 SEER/60 KBTU 95% AFUE	Each						0%		
Mobile Home Split System, 2 TON 16 SEER/75 KBTU 95% AFUE	Each						0%		
Mobile Home Split System, 3 TON 16 SEER/60 KBTU 95% AFUE	Each						0%		

Mobile Home Split System, 3 TON 16 SEER/75 KBTU 95% AFUE	Each						0%			Mobile Home Split System, 3 TON 16 SEER/75 KBTU 95% AFUE	Each						0%		
Mobile Home Split System, 4 TON 16 SEER/72 KBTU 95% AFUE	Each						0%			Mobile Home Split System, 4 TON 16 SEER/72 KBTU 95% AFUE	Each						0%		
Replace FAU with HE FAU, 100 KBTU 95% AFUE	Each						0%			Replace FAU with HE FAU, 100 KBTU 95% AFUE	Each						0%		
Replace FAU with HE FAU, 40 KBTU 95% AFUE	Each						0%			Replace FAU with HE FAU, 40 KBTU 95% AFUE	Each						0%		
Replace FAU with HE FAU, 60 KBTU 95% AFUE	Each						0%			Replace FAU with HE FAU, 60 KBTU 95% AFUE	Each						0%		
Replace FAU with HE FAU, 80 KBTU 95% AFUE	Each						0%			Replace FAU with HE FAU, 80 KBTU 95% AFUE	Each						0%		
Replace Package G/E with 16+ SEER/80%+ AFUE - 2 1/2 Ton	Each						0%			Replace Package G/E with 16+ SEER/80%+ AFUE - 2 1/2 Ton	Each						0%		
Replace Package G/E with 16+ SEER/80%+ AFUE - 2 Ton	Each						0%			Replace Package G/E with 16+ SEER/80%+ AFUE - 2 Ton	Each						0%		
Replace Package G/E with 16+ SEER/80%+ AFUE - 3 1/2 Ton	Each						0%			Replace Package G/E with 16+ SEER/80%+ AFUE - 3 1/2 Ton	Each						0%		
Replace Package G/E with 16+ SEER/80%+ AFUE - 3 Ton	Each						0%			Replace Package G/E with 16+ SEER/80%+ AFUE - 3 Ton	Each						0%		
Replace Package G/E with 16+ SEER/80%+ AFUE - 4 Ton	Each						0%			Replace Package G/E with 16+ SEER/80%+ AFUE - 4 Ton	Each						0%		
Replace Package G/E with 16+ SEER/80%+ AFUE - 5 Ton	Each						0%			Replace Package G/E with 16+ SEER/80%+ AFUE - 5 Ton	Each						0%		
Replace Package HP with 16+ SEER/8.5+ HSPF - 2 1/2 Ton	Each						0%			Replace Package HP with 16+ SEER/8.5+ HSPF - 2 1/2 Ton	Each						0%		
Replace Package HP with 16+ SEER/8.5+ HSPF - 2 Ton	Each						0%			Replace Package HP with 16+ SEER/8.5+ HSPF - 2 Ton	Each						0%		
Replace Package HP with 16+ SEER/8.5+ HSPF - 3 1/2 Ton	Each						0%			Replace Package HP with 16+ SEER/8.5+ HSPF - 3 1/2 Ton	Each						0%		
Replace Package HP with 16+ SEER/8.5+ HSPF - 3 Ton	Each						0%			Replace Package HP with 16+ SEER/8.5+ HSPF - 3 Ton	Each						0%		
Replace Package HP with 16+ SEER/8.5+ HSPF - 4 Ton	Each						0%			Replace Package HP with 16+ SEER/8.5+ HSPF - 4 Ton	Each						0%		
Replace Package HP with 16+ SEER/8.5+ HSPF - 5 Ton	Each						0%			Replace Package HP with 16+ SEER/8.5+ HSPF - 5 Ton	Each						0%		
Replace Split AC Only with 16+ SEER - 2 1/2 Ton	Each						0%			Replace Split AC Only with 16+ SEER - 2 1/2 Ton	Each						0%		
Replace Split AC Only with 16+ SEER - 2 Ton	Each						0%			Replace Split AC Only with 16+ SEER - 2 Ton	Each						0%		
Replace Split AC Only with 16+ SEER - 3 1/2 Ton	Each						0%			Replace Split AC Only with 16+ SEER - 3 1/2 Ton	Each						0%		
Replace Split AC Only with 16+ SEER - 3 Ton	Each						0%			Replace Split AC Only with 16+ SEER - 3 Ton	Each	1	345	0.312	-1.53	$ 5,570	16%	15	$ 1,107
Replace Split AC Only with 16+ SEER - 4 Ton	Each						0%			Replace Split AC Only with 16+ SEER - 4 Ton	Each						0%		
Replace Split AC Only with 16+ SEER - 5 Ton	Each						0%			Replace Split AC Only with 16+ SEER - 5 Ton	Each						0%		
Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 1/2 Ton	Each						0%			Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 1/2 Ton	Each						0%		
Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 Ton	Each						0%			Replace Split HP System with 16+ SEER/8.8+ HSPF - 2 Ton	Each						0%		
Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 1/2 Ton	Each						0%			Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 1/2 Ton	Each						0%		
Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 Ton	Each						0%			Replace Split HP System with 16+ SEER/8.8+ HSPF - 3 Ton	Each						0%		
Replace Split HP System with 16+ SEER/8.8+ HSPF - 4 Ton	Each						0%			Replace Split HP System with 16+ SEER/8.8+ HSPF - 4 Ton	Each						0%		
Replace Split HP System with 16+ SEER/8.8+ HSPF - 5 Ton	Each						0%			Replace Split HP System with 16+ SEER/8.8+ HSPF - 5 Ton	Each						0%		
Replace Split System with 16+ SEER/95%+ AFUE - 2 1/2 Ton	Each						0%			Replace Split System with 16+ SEER/95%+ AFUE - 2 1/2 Ton	Each						0%		
Replace Split System with 16+ SEER/95%+ AFUE - 2 Ton	Each						0%			Replace Split System with 16+ SEER/95%+ AFUE - 2 Ton	Each						0%		
Replace Split System with 16+ SEER/95%+ AFUE - 3 1/2 Ton	Each						0%			Replace Split System with 16+ SEER/95%+ AFUE - 3 1/2 Ton	Each						0%		
Replace Split System with 16+ SEER/95%+ AFUE - 3 Ton	Each						0%			Replace Split System with 16+ SEER/95%+ AFUE - 3 Ton	Each	1	693	0.60300	11.52	$ 8,280	24%	20	$ 3,367
Replace Split System with 16+ SEER/95%+ AFUE - 4 Ton	Each						0%			Replace Split System with 16+ SEER/95%+ AFUE - 4 Ton	Each						0%		
Replace Split System with 16+ SEER/95%+ AFUE - 5 Ton	Each						0%			Replace Split System with 16+ SEER/95%+ AFUE - 5 Ton	Each						0%		
Smart Thermostat	Each						0%			Smart Thermostat	Each						0%		
Maintenance										**Maintenance**									
CO/Smoke Alarm Combo	Each						0%			CO/Smoke Alarm Combo	Each	2				$ 158	0%	-	$ -
Comprehensive Home Health and Safety Check-up	Per Home						0%			Comprehensive Home Health and Safety Check-up	Per Home						0%		$ -
Furnace Clean and Tune	Each						0%			Furnace Clean and Tune	Each						0%		$ -
Range Hood	Each						0%			Range Hood	Each						0%		$ -
Smoke Alarm	Each						0%			Smoke Alarm	Each	5				$ 245	1%	-	$ -
Lighting										**Lighting**									
Exterior LED Security Light (photocell and motion sensor)	Each						0%			Exterior LED Security Light (photocell and motion sensor)	Each						0%		
LED Fixtures - Exterior	Each						0%			LED Fixtures - Exterior	Each						0%		
LED Fixtures - Interior	Each						0%			LED Fixtures - Interior	Each						0%		
LED Lamps - 40w Equivalent	Each						0%			LED Lamps - 40w Equivalent	Each						0%		
LED Lamps - 60w Equivalent	Each						0%			LED Lamps - 60w Equivalent	Each						0%		
Miscellaneous										**Miscellaneous**									
Energy Star Qualified Variable Speed Pool pumps	Each						0%			Energy Star Qualified Variable Speed Pool pumps	Each						0%		
Home Energy Monitor	Each						0%			Home Energy Monitor	Each						0%		
Tier 2 Smart Power Strips	Each						0%			Tier 2 Smart Power Strips	Each						0%		
Vacancy Sensors	Each						0%			Vacancy Sensors	Each						0%		
Permitting Fees										**Permitting Fees**									
Permits	Each						0%			Permits	Each					$ 542	2%		
Customer Enrollment										**Customer Enrollment**									
ESA WH Outreach & Assessment	Home						0%			ESA WH Outreach & Assessment	Home	2				$ 280	1%		
ESA WH In-Home Energy Education	Home						0%			ESA WH In-Home Energy Education	Home						0%		
Total Savings/Expenditures			-	-	-	$ -	0%			**Total Savings/Expenditures**			1,235	0.93	249	$ 34,198	100%		

Households Treated		**Total**
- Single Family Households Treated	Home	
- Mobile Homes Treated	Home	
Total Number of Households Treated	Home	-

Households Treated		**Total**
- Single Family Households Treated	Home	**2**
- Mobile Homes Treated	Home	**0**
Total Number of Households Treated	Home	**2**

SoCalGas and SCE

	2023 Expenses [6]		
ESA Program - Pilot Plus and Pilot Deep	**Electric**	**Gas**	**Total**
Direct Implementer -- Administration	$ 349,638	$ 349,638	$ 699,276
Direct Implementer -- Home Audit, Test-In/Out	$ 13,938	$ 14,055	$ 27,993
Direct Implementer -- Marketing and Outreach	$ 26,508	$ 26,508	$ 53,016
Direct Implementer -- Materials	$ 9,397	$ 9,397	$ 18,794
Direct Implementer -- Performance Incentive	$ 7,067	$ 7,067	$ 14,134
Direct Implementer -- WE&T	$ 24,821	$ 24,821	$ 49,641
Direct Implementer -- Remediation & Mitigation	$ 515	$ 515	$ 1,030
IOU -- Admin	$ 65,459	$ 13,123	$ 78,582
IOU -- EM&V Studies (Evaluator)	$ 122,010	$ 122,010	$ 244,019
IOU -- Inspections	$ -	$ -	$ -
TOTAL Pilot Plus and Pilot Deep COSTS	619,352	$ 567,134	$ 1,186,486

SoCalGas

	2023 Expenses [6]		
ESA Program - Pilot Plus and Pilot Deep	**Electric**	**Gas**	**Total**
Administration	$ -	$ 13,123	$ 13,123
Direct Implementation (Non-Incentive)	$ -	$ -	$ -
Direct Implementation	$ -	$ 422,526	$ 422,526 *<<Includes measures costs*
TOTAL Pilot Plus and Pilot Deep COSTS	$ -	$435,649	$435,649

[1] No installation data to report for 2023.
[2] Combined results for SoCalGas and SCE. Data provided by SCE.
[3] 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.
[4] Savings for HVAC measures vary by Climate Zone and are averaged.
[5] Expenses reported by SCE. Includes expenses not recorded in SoCalGas SAP.
[6] Includes only expense recorded in SoCalGas SAP

PY 2023 Low Income Programs Annual Report
ESA Program Table 2D
Expenses and Energy Savings by Measure Installed - CSD Leveraging
SOUTHERN CALIFORNIA GAS COMPANY

	ESA Program - CSD Leveraging								
	2023 Completed & Expensed Installation								
Measures	Units	Quantity Installed	kWh[1] (Annual)	kW[1] (Annual)	Therms[1] (Annual)	Expenses ($)	% of Expenditure	Effective Useful Life (Years)	2023 Total Measure Life Cycle Bill Savings
Appliances									
High Efficiency Clothes Washer	Home	-	-	-	-	$ -	0.0%	-	$ -
Refrigerators	Each	-	-	-	-	$ -	0.0%	-	$ -
Freezers	Each	-	-	-	-	$ -	0.0%	-	$ -
Clother Dryer	Each	-	-	-	-	$ -	0.0%	-	$ -
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%	-	$ -
Tankless Water Heater - NEW	Home	-	-	-	-	$ -	0.0%	-	$ -
Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%	-	$ -
Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	-	$ -
Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%	-	$ -
Solar Water Heating	Home	-	-	-	-	$ -	0.0%	-	$ -
Enclosure									
Air Sealing/Envelope [4]	Home	-	-	-	-	$ -	0.0%	-	$ -
Diagnostic Air Sealing	Home	-	-	-	-	$ -	0.0%	-	$ -
Attic Insulation	Home	-	-	-	-	$ -	0.0%	-	$ -
Floor Insulation	Home	-	-	-	-	$ -	0.0%	-	$ -
Minor Home Repairs	Home	-	-	-	-	$ -	0.0%	-	$ -
HVAC [6]									
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%	-	$ -
Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	-	$ -
High Efficiency Forced Air Unit (HE FAU) - Early Replacement	Home	-	-	-	-	$ -	0.0%	-	$ -
High Efficiency Forced Air Unit (HE FAU) - On Burnout	Home	-	-	-	-	$ -	0.0%	-	$ -
Smart Thermostat	Each	-	-	-	-	$ -	0.0%	-	$ -
Portable A/C	Each	-	-	-	-	$ -	0.0%	-	$ -
Central Heat Pump-FS (propane or gas space)	Home	-	-	-	-	$ -	0.0%	-	$ -
Wholehouse Fan	Home	-	-	-	-	$ -	0.0%	-	$ -
Smart Fan Controller - NEW	Home	-	-	-	-	$ -	0.0%	-	$ -
Maintenance									
Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%	-	$ -
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	-	$ -
Evaporative Cooling Maintenance	Home	-	-	-	-	$ -	0.0%	-	$ -
Range Hood	Home	-	-	-	-	$ -	0.0%	-	$ -
Lighting									
Exterior Hard wired LED fixtures	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%	-	$ -
Air Purifier	Home	-	-	-	-	$ -	0.0%	-	$ -
Cold Storage	Each	-	-	-	-	$ -	0.0%	-	$ -
Comprehensive Home Health and Safety Check-up	Home		-	-	-	$ -	0.0%	-	$ -
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**						
			-						

	Actual Expenses			
ESA Program - CSD Leveraging	**Electric**	**Gas**	**Total**	
Administration	$ -	$ -	$ -	
Direct Implementation (Non-Incentive)	$ -	$ -	$ -	
Direct Implementation	$ -	$ -	$ -	*<<Includes measures costs*
TOTAL CSD Leveraging 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.
[6] Savings for HVAC measures vary by Climate Zone and are averaged.

PY 2023 Low Income Programs Annual Report
ESA Program Table 3
Program Cost Effectiveness
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Program	Ratio of Benefits Over Costs					Net Benefits $M		
	ESACET [1]	Resource Test [2]	TRC	PAC	RIM	ESACET [1]	Resource Test [2]	TRC
ESA In-Unit (SF, MH, MF-In-Unit)	0.70	0.36	0.18	0.18	0.18	($23.3)	($24.3)	($62.8)
ESA MF CAM	N/A	0.44	0.44	0.44	0.44	N/A	($2.1)	($2.1)
ESA MFWB [3] (MF In-Unit, MF CAM, MFWB)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ESA Pilot Plus and Pilot Deep [4]	0.01	0.30	0.01	0.01	0.01	($1.2)	($0.0)	($1.2)
Building Electrification (N/A for SoCalGas)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Clean Energy Homes (N/A for SoCalGas)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Notes:

Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).

All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined in D.21-06-015, include any measure with a unit savings of less than one kWh or one therm.

Energy Division instructed the IOUs to use the results of the PY2015 to 2017 ESA Impact Evaluation for the savings estimates. This does not apply to ESA CAM. ESA CAM savings estimates are based on approved workpapers.

[1] The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs. For this Amended Report, in addition to modifying measure quantities and costs for the cost effectiveness calculation, SoCalGas removed the measures Comprehensive Home Health and Safety Check-up and CO and Smoke Alarm from the Non-Energy Benefit calculations which were inadvertently included in the original calculation.

[2] The Resource Test includes energy benefits and program measure and installation costs.

[3] No MFWB installations we completed in 2023.

[4] For PP/PD, the ESACET value was calcualted by using both Therm and kWh costs to ensure sure both SCE and SCG have uniform and consistent ESACET.

PY 2023* Low Income Programs Annual Report
ESA Program Table 4
Detail by Housing Type and Source [1]
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined		2023 Energy Savings [2]				
Customer	**Housing Type**	**# Homes Treated**	**(mWh)**	**(MW)**	**(Therm)**	**2023 Expenses**
Gas and Electric Customers						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Electric Customers (only)						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Gas Customers (only)						
Owners - Total		**44,990**	-	-	**1,006,248**	**$53,439,191**
	Single Family	41,161			938,430	$48,288,716
	Multi Family	141			1,724	$157,165
	Mobile Homes	3,688			66,094	$4,993,310
Renters - Total		**11,065**	-	-	**142,811**	**$4,079,257**
	Single Family	8,197			123,446	$3,628,870
	Multi Family	2,669			17,262	$399,427
	Mobile Homes	199			2,103	$50,960
Gas and Electric Total [5]		**56,055**			**1,149,059**	**57,518,448**
ESA Multifamily In-Unit [3]						
ESA Multifamily Common Area		5,793			74,631	$4,008,225
ESA Multifamily Whole Building [4]		-			-	-
Totals:		**61,848**	-	-	**1,223,690**	**61,526,673**

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[1] Summary data which includes ESA Main Program (SF, MH, MF In-Unit) and MF CAM.

[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] No completed MFWB installations in 2023.

[5] Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1. Totals do not include vacant units that are reflected in ESA Program Table 2 - ESA Main Program.

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
2023	PG&E	104,543	2,315
2023	SCE	1,281,784	4,724
2023	SDG&E	17,333	8

PY 2023 Low Income Programs Annual Report [1]
ESA Program Table 5
ESA Program Direct Purchases & Installation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Contractor	County [2]	Contractor Type (Check one or more if applicable)				2023 Annual Expenditures [3]
		Private	CBO	WMDVBE	LIHEAP	
ABM BUILDING SOLUTIONS LLC**	LA, OC	x	-	-	-	$ 620,506
AMERICAN ECO SERVICES INC	I, LA, R, Sbe, Sba, SLO, V	x	-	x	-	$ 4,788,098
ARCA RECYCLING INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sbe, SLO, T, V	x	-	-	-	$ 440,060
ASSERT INC*	LA, Sbe, V	-	x	-	-	$ (12,678)
DIVERSIFIED THERMAL SERVICES LLC**	LA, OC, R, Sbe	x	-	-	-	$ 2,138,084
EAGLE SYSTEMS INTERNATIONAL INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	x	-	-	-	$ 9,497,875
EAGLE SYSTEMS INTERNATIONAL INC**	LA, OC	x	-	-	-	$ 20,659
EAST LOS ANGELES COMMUNITY UNION	LA, OC, R, Sbe	-	x	x	-	$ 12,967,623
ENVIRONMENTAL ASSESSMENT SERVICES	I, LA, OC, R, Sbe, V	x	-	x	-	$ 3,904,678
GOSS ENGINEERING**	R	x				$ 5,016,731
FCI MANAGEMENT CONSULTANTS	LA	x	-	x	-	$ 8,835
JOHN HARRISON CONTRACTING INC	I, Ki, LA, R, Sbe, T	x	-	x	-	$ 619,819
LOTUS CONSTRUCTION & PROPERTY	I, LA, OC, R, Sbe, V	-	x	x	x	$ 404,492
MARAVILLA FOUNDATION	I, Ke, LA, OC, R, Sbe	-	x	x	x	$ 10,397,705
MGM ENERGY	LA, OC, R, Sbe	x	-	x	-	$ 2,594,317
PORTER BOILER SERVICE INC**	LA, OC, R	x	-	-	-	$ 1,086,423
PROTEUS INC	F, Ke, Ki, LA, Sbe, Sba, T, V	-	x	x	-	$ 1,468,390
QUALITY CONSERVATION SERVICES	LA, OC, R, Sbe	x	-	-	-	$ 14,541,314
RELIABLE ENERGY MANAGEMENT INC*	F, Ke, Ki, LA, OC, R, Sbe, T, V	x	-	x	-	$ (121,220)
RICHARD HEATH & ASSOCIATES INC	I, Ke, Ki, LA, OC, R, Sbe, Sba, V	x	-	x	-	$ 1,434,518
SIERRA WEATHERIZATION COMPANY INC*	LA, R, Sbe, V	x	-	-	-	$ (2,016)
STAPLES & ASSOCIATES	Ke, LA	x	-	-	-	$ 891,985
WINEGARD ENERGY INC	F, Ke, Ki, T	x	-	-	-	$ 1,588,003
Total Contractor Expenditures						**$ 74,294,200**

* These contractors had active contracts with SoCalGas (still being paid) but weren't working in the field in 2023 due to being offboarded. They provided in-field services for the listed counties in 2022. Negative amounts reflect reconciliation of accounts as part of offboarding process which could include chargebacks.

** MF CAM Contractors

Note: D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[1] Summary data which includes ESA Main Program (SF, MH, MF In-Unit) and MF CAM

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

[3] The expenditures include contractor costs for ESA Main and MF-CAM to total $74,294,200. A credit for a refunded contractor check ($142,884) is not included. Table 5 is calculated as follows: $70,419,693 (ESA Main) + 3,874,507 (MF-CAM) = $74,294,200. Table 7, column D is calculated as follows: $68,908,595 + $1,368,214 (ESA Main that includes refunded check) + $3,874,507 (MF CAM) + $422,526 (PP/PD) = $74,573,842

PY 2023* Low Income Programs Annual Report
ESA Program Table 6
ESA Program Installation Cost of Program Installation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Main ESA Program [5]	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2023 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households [6]	Costs [1]	Cost/ Unit	Cost/ Household
		Units	%	Units	%	$	%	Units	%	Units	%	$	%					
Dwellings	Home	182,552	42%	22,120	37%	$ 22,407,623	34%	253,397	58%	37,632	63%	$ 42,832,483	66%	435,949	59,752	$ 65,240,106	$ 150	$ 1,092
Appliances																		
High Efficiency Clothes Washer	Home	-	0%	-	0%	$ -	0%	785	100%	785	100%	$ 793,068	100%	785	785	$ 793,068	$ 1,010	$ 1,010
Refirgerators	Each	-	0%	-	0%	$ -	0%		0%		0%		0%	-	-		$ -	$ -
Freezers	Each	-	0%	-	0%	$ -	0%		0%		0%		0%	-	-		$ -	$ -
Clothers Dryer	Each	-	0%	-	0%	$ -	0%		0%		0%		0%	-	-		$ -	$ -
Dishwasher	Each	-	0%	-	0%	$ -	0%		0%		0%		0%	-	-		$ -	$ -
Domestic Hot Water																		
Other Domestic Hot Water [2]	Home	21,763	42%	21,763	42%	$ 1,206,880	39%	29,833	58%	29,833	58%	$ 1,863,038	61%	51,596	51,596	$ 3,069,918	$ 59	$ 59
Water Heater Tank and Pipe Insulation [3]	Home	11,750	51%	11,750	51%	$ 491,899	57%	11,345	49%	11,345	49%	$ 373,043	43%	23,095	23,095	$ 864,942	$ 37	$ 37
Water Heater Repair/Replacement	Home	6,948	55%	6,948	55%	$ 2,144,911	35%	5,679	45%	5,679	45%	$ 3,943,211	65%	12,627	12,627	$ 6,088,122	$ 482	$ 482
Tankless Water Heater - New	Home		0%		0%		0%	437	100%	437	100%	$ 1,678,600	100%	437	437	$ 1,678,600	$ 3,841	$ 3,841
Thermostatic Shower Valve	Each	24,154	46%	23,574	46%	$ 1,240,791	46%	28,110	54%	27,411	54%	$ 1,443,985	54%	52,264	50,985	$ 2,684,776	$ 51	$ 53
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	7,182	59%	7,067	59%	$ 925,233	59%	5,040	41%	4,964	41%	$ 651,053	41%	12,222	12,031	$ 1,576,286	$ 129	$ 131
Solar Water Heaing	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Enclosure																		
Air Sealing / Envelope [4]	Home	12,676	39%	12,676	39%	$ 1,313,312	33%	20,089	61%	20,089	61%	$ 2,703,500	67%	32,765	32,765	$ 4,016,812	$ 123	$ 123
Diagnostic Air Sealing	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Attic Insulation	Home	625	13%	625	13%	$ 1,046,640	10%	4,161	87%	4,161	87%	$ 9,244,242	90%	4,786	4,786	$ 10,290,882	$ 2,150	$ 2,150
Floor Insulation	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Minor Home Repair	Home													-	-			
HVAC																		
Furnace Repair/Replacement	Home	452	35%	452	35%	$ 1,392,525	36%	835	65%	835	65%	$ 2,510,601	64%	1,287	1,287	$ 3,903,126	$ 3,033	$ 3,033
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	433	46%	433	46%	$ 339,893	51%	518	54%	518	54%	$ 321,675	49%	951	951	$ 661,568	$ 696	$ 696
Energy Efficient Fan Control	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Prescriptive Duct Sealing	Home	8,934	36%	8,934	36%	$ 1,084,280	36%	15,573	64%	15,573	64%	$ 1,911,399	64%	24,507	24,507	$ 2,995,679	$ 122	$ 122
High Efficiency Forced Air Unit (HE FAU) Early Replacement	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Smart Thermostat	Home	3,016	25%	3,016	25%	$ 779,971	14%	9,051	75%	9,051	75%	$ 4,914,293	86%	12,067	12,067	$ 5,694,264	$ 472	$ 472
High Efficiency Forced Air Unit (HE FAU) On Burnout	Home	812	54%	812	54%	$ 3,166,300	99%	680	46%	680	46%	$ 26,781	1%	1,492	1,492	$ 3,193,081	$ 2,140	$ 2,140
Portable A/C	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Central Heat Pump - FS (propane or gas space)	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Wholehouse Fan	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Smart Fan Controller - New	Home	276	10%	276	10%	$ 44,920	10%	2,567	90%	2,567	90%	$ 419,270	90%	2,843	2,843	$ 464,190	$ 163	$ 163
Maintenance																		
Furnace Clean and Tune	Home	709	28%	709	28%	$ 99,130	41%	1,793	72%	1,793	72%	$ 143,830	59%	2,502	2,502	$ 242,960	$ 97	$ 97
Central A/C Tune-up	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Evaorative Cooling Maintenance	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Range Hood	Home																	
Lighting																		
Exterior Hard wired LED fixtures	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%	-	-		$ -	$ -
Air Purifier	Home		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Cold Storage	Each		0%		0%		0%		0%		0%		0%	-	-		$ -	$ -
Comprehensive Home Health and Safety Check-up	Home	14,162	40%	14,162	40%	$ 906,820.00	40%	21,267	60%	21,267	60%	$ 1,356,707	60%	35,429	35,429	$ 2,263,527	$ 64	$ 64
CO and Smoke Alarm	Home	12,833	41%	12,833	41%	$ 2,791,481.00	40%	18,747	59%	18,747	59%	$ 4,211,901	60%	31,580	31,580	$ 7,003,382	$ 222	$ 222
Pilots																		
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%	-	-		$ -	$ -
Outreach & Assessment																		
Customer Enrollment	Home	29,847	42%	29,847	42%	$ 3,016,411	45%	41,184	58%	41,184	58%	$ 3,753,859	55%	71,031	71,031	$ 6,770,270	$ 95	$ 95
In-Home Education	Home	25,980	42%	25,980	42%	$ 416,226	42%	35,703	58%	35,703	58%	$ 568,427	58%	61,683	61,683	$ 984,653	$ 16	$ 16

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended main ESA Program results includes the committed funds period.

[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.
[5] Any measures noted as 'NEW' have been added during the course of this program year; those noted as "REMOVED" are no longer offered by the program but have been kept for tracking purposes.
[6] May include work done on a single household by multiple contractors.

	A	B	C	D	E
1	**PY 2023* Low Income Programs Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element [1] SOUTHERN CALIFORNIA GAS COMPANY**				
2	Amended results noted in red font and underlined				
3	**ESA Program:**	**Labor [1]**	**Non-Labor [2]**	**Contractor [3]**	**Total**
4	**Energy Efficiency**				
5	**ESA Program Main (SF, MH, MF In-Unit)**				
6	Appliances	$ -	$ -	$ 1,059,404	$ 1,059,404
7	Domestic Hot Water [4]	$ -	$ (118)	$ 16,730,929	$ 16,730,811
8	Enclosure [4]	$ -	$ (62)	$ 14,468,799	$ 14,468,737
9	HVAC [4]	$ -	$ (648)	$ 17,672,478	$ 17,671,829
10	Maintenance [4]	$ -	$ -	$ 9,557,176	$ 9,557,176
11	Lighting	$ -	$ -		$ -
12	Miscellaneous [5]	$ -	$ -	$ 1,349,135	$ 1,349,135
13	Customer Enrollment [4]		$ 7,487	$ 7,134,477	$ 7,141,965
14	In Home Education	$ -	$ 94	$ 936,198	$ 936,292
15	Pilot	$ -	$ -	$ -	$ -
16	**ESA Program Main Total**	**$ -**	**$ 6,754**	**$ 68,908,595**	**$ 68,915,349**
17	**Multifamily Common Area Measures**				
18	Appliances	$ -	$ -	$ -	$ -
19	Domestic Hot Water [4]	$ -	$ -	$ -	$ -
20	Enclosure [4]	$ -	$ -	$ -	$ -
21	HVAC [4]	$ -	$ -	$ -	$ -
22	Maintenance [4]	$ -	$ -	$ -	$ -
23	Lighting	$ -	$ -	$ -	$ -
24	Miscellaneous [5]	$ -	$ -	$ -	$ -
25	Customer Enrollment [4]	$ -	$ -	$ -	$ -
26	In Home Education	$ -	$ -	$ -	$ -
27	Pilot	$ -	$ -	$ -	$ -
28	**MF CAM Total**	**$ -**	**$ 2,946**	**$ 3,874,507**	**$ 3,877,453**
29	**Multifamily Whole Building**				
30	Appliances	$ -	$ -	$ -	$ -
31	Domestic Hot Water [4]	$ -	$ -	$ -	$ -
32	Enclosure [4]	$ -	$ -	$ -	$ -
33	HVAC [4]	$ -	$ -	$ -	$ -
34	Maintenance [4]	$ -	$ -	$ -	$ -
35	Lighting	$ -	$ -	$ -	$ -
36	Miscellaneous [5]	$ -	$ -	$ -	$ -
37	Customer Enrollment [4]	$ -	$ -	$ -	$ -
38	In Home Education	$ -	$ -	$ -	$ -
39	Pilot	$ -	$ -	$ -	$ -
40	**MFWB Total**	**$ -**	**$ -**	**$ -**	**$ -**
41	**Pilot Plus/Deep [7]**				
42	Appliances	$ -	$ -	$ -	$ -
43	Domestic Hot Water [4]	$ -	$ -	$ -	$ -
44	Enclosure [4]	$ -	$ -	$ -	$ -
45	HVAC [4]	$ -	$ -	$ -	$ -
46	Maintenance [4]	$ -	$ -	$ -	$ -
47	Lighting	$ -	$ -	$ -	$ -
48	Miscellaneous [5]	$ -	$ -	$ -	$ -
49	Customer Enrollment [4]	$ -	$ -	$ -	$ -
50	In Home Education	$ -	$ -	$ -	$ -
51	Pilot	$ -	$ -	$ -	$ -
52	**Pilot Plus/Deep Total**	**$ -**	**$ -**	**$ 422,526**	**$ 422,526**
53	**CSD Leveraging**				
54	Appliances	$ -	$ -	$ -	$ -
55	Domestic Hot Water [4]	$ -	$ -	$ -	$ -
56	Enclosure [4]	$ -	$ -	$ -	$ -
57	HVAC [4]	$ -	$ -	$ -	$ -
58	Maintenance [4]	$ -	$ -	$ -	$ -
59	Lighting	$ -	$ -	$ -	$ -
60	Miscellaneous [5]	$ -	$ -	$ -	$ -
61	Customer Enrollment [4]	$ -	$ -	$ -	$ -
62	In Home Education	$ -	$ -	$ -	$ -
63	Pilot	$ -	$ -	$ -	$ -
64	**CSD Total**	**$ -**	**$ -**	**$ -**	**$ -**
65	**Energy Efficiency TOTAL**	**$ -**	**$ 9,700**	**$ 73,205,628**	**$ 73,215,328**
66	**Administrative [6]**				
67	Training Center	$ 612,580	$ 10,301	$ -	$ 622,881
68	Worforce Education and Training	$ -	$ -	$ -	
69	Inspections	$ -	$ -	$ 1,368,214	$ 1,368,214
70	Marketing and Outreach	$ -	$ 1,377,599	$ -	$ 1,377,599
71	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
72	Measurement and Evaluation Studies	$ 54	$ 57,341	$ -	$ 57,394
73	Regulatory Compliance	$ 353,267	$ 65,733	$ -	$ 419,000
74	General Administration	$ 4,606,955	$ 2,097,915	$ -	$ 6,704,870
75	CPUC Energy Division	$ -	$ 71,328	$ -	$ 71,328
76	MF CAM Admin	$ 130,772	$ -	$ -	$ 130,772
77	MFWB Admin [7]		$ 148,883	$ -	$ 148,883
78	Pilot Plus/Deep Admin [7]	$ 13,123	$ -	$ -	$ 13,123
79	**Administrative Total**	**$ 5,716,751**	**$ 3,829,100**	**$ 1,368,214**	**$ 10,914,064**
80					
81	**TOTAL PROGRAM COSTS**	**$ 5,716,751**	**$ 3,838,800**	**$ 74,573,842**	**$ 84,129,392**
82					
83	* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amnended results for main ESA Program include the committed funds period.				
84	Note: No MFWB installations completed in 2023.				
85					
86	[1] Labor: Utility staff labor including labor indirects (vacation and sick leave, payroll taxes.				
87	[2] Non-Labor: All other non-labor costs excluding contractor costs defined below.				
88	[3] Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In Home Energy Education services.				
89	[4] Includes cash discount and other misc. credits in non-labor.				
90	[5] Performance-Based Incentive (PBI) for contractors meeting their therm goal per quarter.				
91	[6] Note that "below the line" summary costs if applicable includes ESA Main Program (SF, MH, MF In-unit), MFWB, Pilot Plus/Deep and CSD Leveraging.				
92	[7] Includs only expenses recorded in SoCalGas SAP.				

PY 2023 Low Income Programs Annual Report [1]
ESA Program Table 8
ESA Program Homes Unwilling / Unable to Participate
SOUTHERN CALIFORNIA GAS COMPANY

	Reason Provided						
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
Fresno	3	0	0	0	0	5	1
Imperial	14	0	0	3	4	5	1
Kern	167	3	0	6	5	6	3
Kings	14	0	0	3	1	6	4
Los Angeles	2,863	52	0	106	184	197	103
Orange	154	8	0	16	35	21	7
Riverside	565	49	0	42	83	88	59
San Bernardino	839	16	0	53	64	82	41
San Luis Obispo	0	0	0	0	1	0	0
Santa Barbara	0	1	0	0	7	0	0
Tulare	43	0	1	26	9	26	35
Ventura	15	0	0	1	2	2	0
Total	**4,677**	**129**	**1**	**256**	**395**	**438**	**254**

[1] Summary data for Main ESA Program and does not include CSD Leveraging and MF Common Area efforts.

ESA Coordinated Treatment (SCE and SoCalGas only)

	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]				
# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# 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
4,065	1,574	544	-	19	1,928

[1] Summary data for Main ESA Program and does not include CSD Leveraging and MF Common Area efforts.

PY 2023 Energy Savings Assistance Program Annual Report
ESA Program Table 9
Energy Rate Used for Bill Savings Calculation
SOUTHERN CALIFORNIA GAS COMPANY

Residential Energy Used for Bill Savings Calculation [1]			Non-Residential Energy Used for Bill Savings Calculation (MF In-Unit, MF CAM, MFWB) [2]		
Year	$/kWh	$/Therm [3]	Year	$/kWh	$/Therm [3]
2023	N/A	1.39	2023	N/A	1.39
2024	N/A	1.43	2024	N/A	1.43
2025	N/A	1.47	2025	N/A	1.47
2026	N/A	1.52	2026	N/A	1.52
2027	N/A	1.56	2027	N/A	1.56
2028	N/A	1.61	2028	N/A	1.61
2029	N/A	1.66	2029	N/A	1.66
2030	N/A	1.71	2030	N/A	1.71
2031	N/A	1.76	2031	N/A	1.76
2032	N/A	1.81	2032	N/A	1.81
2033	N/A	1.87	2033	N/A	1.87
2034	N/A	1.92	2034	N/A	1.92
2035	N/A	1.98	2035	N/A	1.98
2036	N/A	2.04	2036	N/A	2.04
2037	N/A	2.10	2037	N/A	2.10
2038	N/A	2.17	2038	N/A	2.17
2039	N/A	2.23	2039	N/A	2.23
2040	N/A	2.30	2040	N/A	2.30
2041	N/A	2.37	2041	N/A	2.37
2042	N/A	2.44	2042	N/A	2.44
2043	N/A	2.51	2043	N/A	2.51
2044	N/A	2.59	2044	N/A	2.59
2045	N/A	2.66	2045	N/A	2.66
2046	N/A	2.74	2046	N/A	2.74
2047	N/A	2.83	2047	N/A	2.83

[1] Summary includes ESA Main Program (SF, MH, MF-In-Unit) Pilot Plus and Pilot Deep andCSD Leveraging. Building Electrification and Clean Energy Homes iare not applicable.

[2] Summary data includes ESA MF CAM and MFWB. MF In-Unit is shown in residential rates.

[3] Non-residental customers billed at the residential rate per AL 5915 Attachment B. Actual 2023 energy rate per therm paid by ESA Program participants. Energy rate beyond 2023 is escalated 3% annually

	A	B	C	D	E
1	**PY 2023* Low Income Programs Annual Report ESA Program Table 10 Bill Savings Calculations by Program Year SOUTHERN CALIFORNIA GAS COMPANY**				
2	**Table 10 - ESA Program Main (SF, MH, MF In-Unit)**				
3	Amended results noted in red font and underlined				
4	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
5	2013	$ 97,554,614	$ 14,434,223	0.15	$ 135
6	2014	$ 93,781,355	$ 13,802,052	0.15	$ 147
7	2015	$ 74,817,588	$ 9,458,585	0.13	$ 118
8	2016	$ 58,777,190	$ 10,005,458	0.17	$ 143
9	2017	$ 79,364,204	$ 10,752,700	0.14	$ 115
10	2018	$ 93,149,896	$ 10,559,891	0.11	$ 106
11	2019	$ 111,539,060	$ 5,544,743	0.05	$ 45
12	2020	$ 96,838,449	$ 5,169,470	0.05	$ 41
13	2021	$ 111,430,005	$ 6,952,602	0.06	$ 53
14	2022	$ 104,436,368	$ 6,803,313	0.07	$ 65
15	2023	$ 79,536,635	$ 15,388,205	0.19	$ 275
16					
17	* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended results for main ESA Progra include the committed funds period.				
18	Note: Savings are based on the results of the 2015-2017 Impact Evaluation completed in 2019, starting from PY2019.				
19					
20	**Table 10A - Pilot Plus/Deep**				
21	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
22	2013				
23	2014				
24	2015				
25	2016				
26	2017				
27	2018				
28	2019ì				
29	2020				
30	2021				
31	2022	N/A	N/A	N/A	N/A
32	2023	$ 1,186,486	$ 12,325	0.01	$ 6,163
33					
34	Note: Combined data for SoCalGas and SCE.				
35					
36	**Table 10B - MF CAM and MFWB**				
37	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
38	2013				
39	2014				
40	2015				
41	2016				
42	2017				
43	2018				
44	2019ì				
45	2020				
46	2021				
47	2022	$ 2,658,870	$ 3,161,987	1.19	$ 1,143
48	2023	$ 4,008,225	$ 2,032,208	0.51	$ 351
49					
50	Note: No MFWB installations completed in 2023. Data only reflects MF CAM.				

PY 2023 Low Income Programs Annual Report
ESA Program Table 11
Fund Shifting [1]
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Date	Program Year 2023	Budget [1] Electric	Budget [1] Gas	Budget [1] Total Authorized	Expenditures Electric	Expenditures Gas	Expenditures Total Expenditures	Variance (Budget - Expenditures) Electric	Variance (Budget - Expenditures) Gas	Variance (Budget - Expenditures) Total	FUND SHIFT AMOUNT: Among Categories within Program Year (1) Shift of Current Year Authorized Electric	Gas	Total	Carry Forward from 2022 (2) Shift of Carry Forward Electric	Gas	Total	Uncommited, Unspent from 2023 (3) Offset Collections Electric	Gas	Total	Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Uncommitted, Unspent	To/From Year	Fund Shift Description	Authorization
	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	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.
	ESA Main Subtotal	**$ -**	**$ 82,837,720**	**$ 82,837,720**	**$ -**	**$ 68,915,349**	**$ 68,915,349**	**$ -**	**$ 13,922,371**	**$ 13,922,371**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 13,922,371**	**$ 13,922,371**	**$ 13,922,371**	**17%**	1. 2. 3. Uncommitted, unspent	1. 2. 3. 2023	2. 3. Ofrset collections	1. 2. 3. D.21-06-015
	Multifamily CAM	$ -	$ 8,001,130	$ 8,001,130	$ -	$ 3,877,452	$ 3,877,452	$ -	$ 4,123,678	$ 4,123,678	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Multifamily Whole Building	$ -	$ 21,477,314	$ 21,477,314	$ -	$ -	$ -	$ -	$ 21,477,314	$ 21,477,314	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot Plus/Deep	$ -	$ 6,510,545	$ 6,510,545	$ -	$ 422,526	$ 422,526	$ -	$ 6,088,019	$ 6,088,019	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency Total	**$ -**	**$ 118,826,709**	**$ 118,826,709**	**$ -**	**$ 73,215,327**	**$ 73,215,327**	**$ -**	**$ 45,611,383**	**$ 45,611,383**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Administration																								
	Training Center	$ -	$ 777,697	$ 777,697	$ -	$ 622,881	$ 622,881	$ -	$ 154,816	$ 154,816	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	$ -	$ 1,510,696	$ 1,510,696	$ -	$ 1,368,214	$ 1,368,214	$ -	$ 142,482	$ 142,482	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach	$ -	$ 1,398,505	$ 1,398,505	$ -	$ 1,377,599	$ 1,377,599	$ -	$ 20,906	$ 20,906	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	M&E Studies	$ -	$ 262,500	$ 262,500	$ -	$ 57,394	$ 57,394	$ -	$ 205,106	$ 205,106	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Regulatory Compliance	$ -	$ 472,833	$ 472,833	$ -	$ 419,000	$ 419,000	$ -	$ 53,833	$ 53,833	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration	$ -	$ 7,478,835	$ 7,478,835	$ -	$ 6,704,870	$ 6,704,870	$ -	$ 773,965	$ 773,965	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division [2]	$ -	$ 98,059	$ 98,059	$ -	$ 71,328	$ 71,328	$ -	$ 26,731	$ 26,731	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	ESA Main Admin Subtotal	**$ -**	**$ 11,999,125**	**$ 11,999,125**	**$ -**	**$ 10,621,286**	**$ 10,621,286**	**$ -**	**$ 1,377,839**	**$ 1,377,839**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 1,377,839**	**$ 1,377,839**	**$ 1,377,839**	**11%**	1. 2. 3. Uncommitted, unspent	1. 2. 3. 2023	1. 2. 3. Ofrset collections	1. 2. 3. D.21-06-015
	MF CAM Admin	$ -	$ 800,113	$ 800,113	$ -	$ 130,772	$ 130,772	$ -	$ 669,341	$ 669,341	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	MFWB Admin	$ -	$ 2,147,731	$ 2,147,731	$ -	$ 148,883	$ 148,883	$ -	$ 1,998,848	$ 1,998,848	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	PP/PD Admin	$ -	$ 651,054	$ 651,054	$ -	$ 13,123	$ 13,123	$ -	$ 637,931	$ 637,931	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Administration Total		**$ 15,598,023**	**$ 15,598,023**	**$ -**	**$ 10,914,064**	**$ 10,914,064**	**$ -**	**$ 4,683,959**	**$ 4,683,959**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0%**	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	**$ -**	**$ 134,424,732**	**$ 134,424,732**	**$ -**	**$ 84,129,391**	**$ 84,129,391**	**$ -**	**$ 50,295,341**	**$ 50,295,341**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0%**	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended main ESA Program results include the committed funds period.

[1] Reflects the authorized funding in D.21-06-015 and AL 5865.

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

	A	B
1	**PY 2023* Low Income Programs Annual Report**	
2	**ESA Program Table 12**	
3	**Categorical and Other Enrollment**	
4	**SOUTHERN CALIFORNIA GAS COMPANY**	
5	Amended results noted in red font and underlined	
6	**ESA Main (SF, MH, MF In-Unit)**	
7	**Type of Enrollment**	**Number of Homes Treated**
8	Women, Infants, and Children Program (WIC)	676
9	Supplemental Security Income (SSI)	529
10	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	863
11	CalWORKs/Temporary Assistance for Needy Families (TANF)	36
12	Tribal TANF	5
13	Medi-Cal	10,701
14	Medicaid/Medi-Cal for Families	21
15	Healthy Families A&B	0
16	National School Lunch Program (NSLP) - Free Lunch	25
17	Low-income Home Energy Assistance Program (LIHEAP)	5
18	Bureau of Indian Affairs General Assistance	0
19	Head Start Income Eligible - (Tribal Only)	0
20	Other	210
21	**Total**	**13,071**
22		
23	* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended main ESA Program results includes the committed funds period.	
24		
25	**Pilot Plus/Deep**	
26	**Type of Enrollment**	**Number of Homes Treated**
27	Women, Infants, and Children Program (WIC)	
28	Supplemental Security Income (SSI)	2
29	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	
30	CalWORKs/Temporary Assistance for Needy Families (TANF)	
31	Tribal TANF	
32	Medi-Cal	
33	Medicaid/Medi-Cal for Families	
34	Healthy Families A&B	
35	National School Lunch Program (NSLP) - Free Lunch	
36	Low-income Home Energy Assistance Program (LIHEAP)	
37	Bureau of Indian Affairs General Assistance	
38	Head Start Income Eligible - (Tribal Only)	
39	Other	
40	**Total**	**2**

PY 2023 Low Income Programs Annual Report
ESA Program Table 13A
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	$1,134,196	N/A	N/A	1,187	See note "A".	Yes	N/A
Leveraging	Pasadena Water and Power (PWP)	SoCalGas has a signed leveraging contract with PWP	Yes	Yes	$4,681	N/A	N/A	7	See note "A".	Yes	N/A
Leveraging	Riverside Public Utilities	SoCalGas has a signed leveraging contract with RPI	Yes	Yes	$152,395	N/A	N/A	330	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	$3,250	N/A	N/A	50	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	$7,688	N/A	N/A	421	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	$2,850	N/A	N/A	19	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	$988,556	N/A	N/A	22,003	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	$1,500	N/A	N/A	10	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	$994	N/A	N/A	58	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	$4,120	N/A	N/A	140	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	$347	N/A	N/A	17	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	$2,499	N/A	N/A	105	See note "A".	Yes	N/A
Leveraging	Los Angeles Water & Power	SoCalGas has a contract with LADWP to co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW), premium efficiency toilets, and other water measures installed in overlapping territory.	Yes	Yes	$78,972	N/A	N/A	1,366	See note "A".	Yes	N/A

MF CAM and MFWB

Coordination Type [1]	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

MF CAM is 100% no-cost direct install. No opportunity to integrate Energy Efficiency co-funded programs.
No MFWB installations completed in 2023.

Pilot Plus/Deep

Coordination Type [1]	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain

Pilot Plus/Deep to c‹Pilot Plus/Deep is a targeted pilot being marketed to a limited customer list. Therefore, no leveraging is taking place at this time.

[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 2023 are caputured 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"	Dollar savings based on invoiced amount for co-funded measures. Enrollments calculated by dividing (dollar savings) by (per measure cost). Result is additional customers that can be treated with High Efficiency Washer (rounded up). Therm savings calculated by multiplying (additional customers that can be treated with High Efficiency Washer) by (per measure therm savings).

PY 2023 Low Income Programs Annual Report
ESA Program Table 13B
Clean Energy Referral, Leveraging, and Coordination
SOUTHERN CALIFORNIA GAS COMPANY

		Outbound	Collaboration		Inbound	
Partner	**Brief Description of Effort**	**# of Referrals [1]**	**# of Leveraging Relationships [2]**	**# of Coordination Efforts [3]**	**# of Leads [4]**	**# of Enrollments from Successful Leads/Referrals [5]**
CARE	CARE customers who are PEV approved are shared with ESA Program.				23,729	3,377
Water Agencies [6]	SoCalGas provides the ability for water agencies to capture water savings through co-funding opportunities.		10 Agencies			22,823
Municipal Electric Providers [7]	SoCalGas provides co-funding opportunities to electric and water providers who might otherwise not offer energy savings measures.		4 Providers			2,890
Project Homekey (Properties)	SoCalGas' ESA Program provides energy efficiency services at no cost to Project Homekey sites.				55	4 Properties (213 Units)
Pilot Plus/Deep to Main [8]	Number of Homes Enrolled in ESA Main as a result of being referred by ESA Whole Home due to home not being able to meet minumum 5% for ESA Whole Home particpation.				50	31

[1] Outbound referrals being given to the Partner Program by ESA Program

[2] Activities that involve the sharing resources to jointly support program delivery or administration. (Example: Sharing of Lead Lists, Cost Splitting, etc.)

[3] Activities related to program communication (marketing), collaboration of events, and alignment of activities (outreach events, tradeshows, etc.) to support program awareness and delivery.

[4] Inbound customer leads or refrerrals to ESA Program from the Partner Program.

[5] Enrollments that results from the Leads or Referrals supplied by the Partner

[6] 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.

[7] Municipal Electric Providers include: Anaheim Public Utilities, Los Angeles Department of Water and Power, Pasadena Water and Power and Riverside Public Utilities.

[8] Pilot Plus/Deep (also known as ESA Whole Home) is a joint pilot with SoCalGas and SCE.

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ESA Program Table 14

Expenditures for Pilots and Studies

SOUTHERN CALIFORNIA GAS COMPANY

	Authorized 2021-2026 Funding [1]			2023 Expenses			Cycle to Date Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
ESA Pilot Plus/Deep Program	N/A	$ 32,552,726	$ 32,552,726	N/A	$ 435,649	$ 435,649	N/A	$ 462,856	$ 462,856	N/A	1%	1%
Total Pilots	**N/A**	**$ 32,552,726**	**$ 32,552,726**	**N/A**	**$ 435,649**	**$ 435,649**	**N/A**	**$ 462,856**	**$ 462,856**	**N/A**	**0%**	**0%**
Studies												
Needs Assessment (LINA) [2]	N/A	$ 62,500	$ 62,500	N/A	$46,618	$46,618	N/A	$ 124,835	$ 124,835		75%	75%
Joint IOU - Multifamily CAM Process Evaluation [3]	N/A	$ 75,000	$ 75,000	N/A	$ -	$ -	N/A	$ 23,761	$ 23,761	N/A	0%	0%
2020 Non Energy Benefits Evaluation (NEB's) [4]	N/A	$ -	$ -	N/A	$ -	$ -	N/A	$ 1,338	$ 1,338	N/A	0%	0%
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study	N/A	$ 62,500	$ 62,500	N/A	$ -	$ -	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	$ -	$ -	N/A	0%	0%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	N/A	$ -	$ -	N/A	$ -	$ -	N/A	$ -	$ -	N/A	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study	N/A	$ 18,750	$ 18,750	N/A	$ 10,776	$ 10,776	N/A	$ 18,836	$ 18,836	N/A	57%	57%
Load Impact Evaluation Study	N/A	$ 375,000	$ 375,000	N/A	$ -	$ -	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	$ -	$ -	N/A	0%	0%
Rapid Feedback Research and Analysis	N/A	$ -	$ -	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	$ -	$ -	N/A	0%	0%
Potential Ad Hoc Tasks	N/A	$ 300,000	$ 300,000	N/A	$ -	$ -	N/A	$ -	$ -	N/A	0%	0%
Total Studies [5]		**$ 1,068,750**	**$ 1,068,750**	**N/A**	**$ 10,776**	**$ 10,776**	**N/A**	**$ 18,836**	**$ 18,836**	**N/A**	**1%**	**1%**

[1] Reflects the authorized funding in D.21-06-015 and AL 5501-G-A plus additional funds allocated from prior-cycle unspent budgets.

[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.

[4] Cycle-to-date amount related to 2020 activity posted in 2021.

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

PY 2023 Low Income Programs Annual Report
ESA Program Table 15
Tribal Outreach
SOUTHERN CALIFORNIA GAS COMPANY

Outreach Status	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Meet & Confer	20	Agua Caliente Band of Cahuilla Indians, Augustine Band of Cahuilla Indians, Cabazon Band of Cahuilla Indians, Cahuilla Band of Mission Indians of the Cahuilla Reservation, Chemehuevi Indian Tribe of the Chemehuevi Reservation, Fort Mojave Indian Tribe, Los Coyotes Band of Cahuilla Cupeno Indians, Morongo Band of Cahuilla Mission Indians, Pechanga Band of Luiseno Indian of the Pechanga Reservation, San Manuel Band of Mission Indians of the San Manuel Reservation, Santa Rosa Band of Cahuilla Indians, Santa Ynez Band of Chumash Indians, Soboba Band of Luiseno Indians , Tachi Yokut Tribe, Torres Martinez Band of Desert Cahuilla Indians, Tule River Tribe, Twenty-Nine Palms Band of Mission Indians, Fernandeno Tataviam Band of Mission Indians, Gabrieleno (Tongva) Band of Mission Indians, Juaneno Band of Mission Indians Acjachemen Nation
Tribes requested outreach materials or applications	20	Agua Caliente Band of Cahuilla Indians, Augustine Band of Cahuilla Indians, Cabazon Band of Cahuilla Indians, Cahuilla Band of Mission Indians of the Cahuilla Reservation, Chemehuevi Indian Tribe of the Chemehuevi Reservation, Fort Mojave Indian Tribe, Los Coyotes Band of Cahuilla Cupeno Indians, Morongo Band of Cahuilla Mission Indians, Pechanga Band of Luiseno Indian of the Pechanga Reservation, San Manuel Band of Mission Indians of the San Manuel Reservation, Santa Rosa Band of Cahuilla Indians, Santa Ynez Band of Chumash Indians, Soboba Band of Luiseno Indians , Tachi Yokut Tribe, Torres Martinez Band of Desert Cahuilla Indians, Tule River Tribe, Twenty-Nine Palms Band of Mission Indians, Fernandeno Tataviam Band of Mission Indians, Gabrieleno (Tongva) Band of Mission Indians, Juaneno Band of Mission Indians Acjachemen Nation
Tribes who have not accepted offer to Meet and Confer	0	
Non-Federally Recognized Tribes who participated in Meet & Confer	3	Juaneno Band of Mission Indians Acjachemen Nation, Gabrieleno (Tongva) Band of Mission Indians, Fernandeno Tataviam Band of Mission Indians
Tribes and Housing Authority sites involved in Focused Project/ESA Partnership offer on Tribal Lands	0	No specific Focused Projects or ESA Partnerships in effect.
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	12	Pechanga Band of Luiseno Indians, Morongo Band of Mission Indians, Soboba Band of Luiseno Indians, Torres Martinez Band of Desert Cahuilla Indians, Cahuilla Band of Indians, Tejon Indian Tribe, Agua Caliente Band of Cahuilla Indians, Cabazon Band of Mission Indians, Chemhuevi Indian Tribe, Santa Ynez Band of Chumash Indians, Augustine Band of Cahuilla Indians, Tule River Tribe
Housing Authority and TANF offices who participated in Meet and Confer	2	Torres Martinez Band of Desert Cahuilla Indians, Soboba Band of Luiseno Indians

PY 2023* Low Income Programs Annual Report
ESA Program Table 16
Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

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	61,011	49,358	81%	485,803	10%				21.6	21.5	$ 937		0.0000
MH	4,497	3,887	86%	612	635%				17.6	17.9	$ 844		
MF In-Unit	28,071	2,813	10%	66,863	4%				6.8	6.9	$ 173		
Rent vs. Own													
Own	47,568	44,990	95%	N/A	0%				22.4	22.4	$ 1,025		0.0000
Rent	46,003	11,065	24%	N/A	0%				13.0	12.8	$ 352		0.0000
Vacant	8	3	38%	N/A	0%				20.7	20.7	$ 298		
Previous vs. New Participant													
New participant	36175	11,200	31%	338,232	3%				20.0	20.2	$ 945		0.0000
Previous Participant	57404	44,858	78%	214,862	21%				20.7	20.6	$ 879		0.0000
Seniors [3]	22,195	17,561	79%	N/A	0%				20.5	20.5	$ 972		0.0000
Veterans [4]	185	308	166%	N/A	0%				23.6	23.5	$ 1,042		0.0002
Hard-to-Reach [5]	54,372	23,920	44%	161,911	15%				18.8	18.7	$ 786		0.0000
Vulnerable [6]	85,919	26,001	30%	497,868	5%				39.8	39.6	$ 1,691		0.0000
Location													
DAC [7]	83,916	50,182	60%	484,689	10%				18.0	19.7	$ 842		0.0000
Rural	9,836	11,080	113%	67,101	17%				19.2	19.4	$ 849		0.0000
Tribal [8]	35	17	49%	206	8%				23.6	24.5	$ 1,362		0.0074
PSPS Zone	N/A		N/A	N/A	N/A								
Wildfire Zone [9]	38,097	28,486	75%	264,366	11%				20.9	21.0	$ 887		0.0000
Climate Zone													
4	172	72	42%	384	19%				10.2	10.3	$ 538		0.0000
5	1,615	1,356	84%	7,648	18%				14.8	16.9	$ 1,290		0.0000
6	4,123	543	13%	8,748	6%				18.0	18.8	$ 980		0.0000
8	28,842	8,492	29%	126,031	7%				17.8	18.1	$ 938		0.0000
9	21,614	8,419	39%	108,349	8%				18.5	16.8	$ 776		0.0000
10	23,280	19,138	82%	179,997	11%				22.6	22.8	$ 913		0.0000
13	6,630	8,669	131%	43,617	20%				19.0	19.0	$ 774		0.0000
14	2,267	4,367	193%	38,917	11%				26.2	26.5	$ 1,102		0.0000
15	3,085	3,451	112%	23,147	15%				21.6	21.7	$ 887		0.0000
16	1,951	1,551	79%	16,182	10%				18.8	18.8	$ 744		0.0000
CARB Communities [10]	22,703	9,529	42%	99,418	10%				17.3	17.1	$ 769		0.0000
Financial													
CARE	62,356	42,391	68%	311,910	14%				20.8	20.8	$ 906		0.0000
Disconnected [2]	-	0	0%	-	0%				-	-	$ -		
Arrearages [11]	49,473	41,346	84%	108,163	38%				6.6	6.6	$ 298		0.0000
High Usage [12]	30,506	12,245	40%	198,492	6%				32.8	32.8	$ 1,489		0.0000
High Energy Burden [13]	849	18,758	2209%	N/A	0%				4.6	4.6	$ 225		0.0000
SEVI [14]													
<25%	1	1	100%	10	10%				11.0	11.0	$ 480		0.0283
25%-50%	-	0	0%	-	0%				-	-	$ -		
50%-75%	37,338	23,556	63%	275,364	9%				22.2	22.2	$ 1,011		0.0000
>75%	40,329	19,435	48%	171,766	11%				17.9	17.8	$ 753		0.0000
Affordability Ratio [15]													
<25%	69,663	41,693	60%	428,787	10%				20.5	20.4	$ 904		0.0000
25%-50%	2,057	353	17%	2,227	16%				13.4	13.6	$ 397		0.0002
50%-75%	65	29	45%	616	5%				12.9	11.7	$ 566		0.0018
>75%	5,883	917	16%	15,510	6%				14.2	14.5	$ 637		0.0000
Health Condition													
Medical Baseline	1,210	1,184	98%	4,043	29%				21.3	21.6	$ 1,002		0.0000
Respiratory [16]													
<25%	2,498	1,435	57%	13,215	11%				20.8	20.7	$ 918		0.0000
25%-50%	13,594	6,995	51%	75,446	9%				19.9	19.9	$ 922		0.0000
50%-75%	30,408	16,162	53%	186,520	9%				20.2	20.1	$ 889		0.0000
>75%	31,168	18,400	59%	171,959	11%				20.5	20.4	$ 887		0.0000
Disabled [4]	7,415	5,728	77%	N/A	0%				20.1	20.0	$ 921		0.0000

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2023 but finished in 2024. SoCalGas allowed its ESA contractors to complete and invoice such committed work by March 31, 2024 (the committed funds period). The amended main ESA Program results include the committed funds period.

[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.

ESA Multifamily Whole Building - No activity in 2023

Customer Segments	# of Properties Eligible	# of Properties Treated	Enrollment Rate = (C/B)	# of Properties Contacted	Uptake Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Property (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Property (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Property	Avg. Energy Savings (Therms) Per Treated Property (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Property (Energy Saving Measures only)	Avg. Cost Per Treated Property	Avg. Property Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. Propety 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			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			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													
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled													
Other			0%		0%								
Vulnerable [8]													
High Energy Burden [14]													
SEVI [15]													
H													
M													
L													
Affordability Ratio [16]													
Respiratory (Asthma) [17]													
H													
M													
L													

Note: MFWB enrollments opened July 2023.

ESA Table 16C MFWB (MF In-unit) - No activity in 2023

Customer Segments	# of Units Eligible [1]	# of UnitsTreated [2]	Enrollment Rate = (C/B)	# of Units Contacted [3]	Rate of Uptake = (C/E) [19]	Avg. Energy Savings (kWh) Per Treated Unit (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (kWh) Per Treated Unit (Energy Saving Measures only) [5]	Avg. Peak Demand Savings (kW) Per Treated Unit	Avg. Energy Savings (Therms) Per Treated Unit (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Unit (Energy Saving Measures only) [5]	Avg. Cost Per Treated Unit	Avg. Properties Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. Properties Energy Savings (Therms) / Total Annual Energy Use (Therms)
Rent vs. Own													
Own													
Rent													
Previous vs. New Participant													
New													
Previous													
Seniors [6]													
Veterans [18]													
Hard-to-Reach [7]													
Vulnerable [8]													
Location													
DAC													
Rural													
Tribal [20]													
PSPS Zone													
Wildfire Zone [9]													
Climate Zone 1 (PG&E)													
Climate Zone 2 (PG&E)													
Climate Zone 3 (PG&E)													
Climate Zone 4 (PG&E)													
Climate Zone 5 (PG&E)													
Climate Zone 11 (PG&E)													
Climate Zone 12 (PG&E)													
Climate Zone 13 (PG&E)													
Climate Zone 14 (PG&E)													
Climate Zone 16 (PG&E)													
CARB Communities [10]													
Financial													
CARE													
FERA													
Disconnected [11]													
Arrearages [12]													
High Usage [13]													
High Energy Burden [14]													
SEVI [15]													
H													
M													
L													
Affordability Ratio [16]													
Health Condition													
Medical Baseline													
Respiratory (Asthma) [17]													
H													
M													
L													
Disabled													

ESA Table 16D Pilot Plus and Pilot Deep - SoCalGas and SCE

Customer Segments	# of Households Eligible [1]	# 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													
SF	4,983	(2) 182949/184986	0.04%	1,666	0.1%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
MH	-	-	0.00%	-	0.0%	-	-	-	-	-	-	-	-
MF In-Unit	-	-	0.00%	-	0.0%	-	-	-	-	-	-	-	-
Rent vs. Own													
Own	4,074	(1) 182949	0.02%	1,408	0.1%	416	416	0.32	30	30	$13,925	0.0346	0.07
Rent	909	(1) 184986	0.11%	258	0.4%	819	819	0.62	219	219	$20,273	0.0439	0.42
Previous vs. New Participant													
Previous	1,264	(1) 182949	0.08%	405	0.3%	416	416	0.32	30	30	$13,925	0.0346	0.07
New Participant	3,719	(1) 184986	0.03%	1,193	0.1%	819	819	0.62	219	219	$20,273	0.0439	0.42
Seniors	N/A	N/A	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Veterans	N/A	N/A	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Hard-to-Reach	4,983	(2) 182949/184986	0.04%	1,666	0.1%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
Vulnerable	1,578	-	0.00%	650	0.2%	-	-	-	-	-	-	-	-
Location													
DAC	1,802	(2) 182949/184986	0.06%	813	0.1%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
Rural	847	-	0.00%	89	1.1%	-	-	-	-	-	-	-	-
Tribal	32	-	0.00%	2	0.0%	-	-	-	-	-	-	-	-
PSPS Zone	89	-	0.00%	24	0.0%	-	-	-	-	-	-	-	-
Climate Zone 06	89	-	0.00%	7	0.0%	-	-	-	-	-	-	-	-
Climate Zone 08	795	-	0.00%	278	0.0%	-	-	-	-	-	-	-	-
Climate Zone 09	1,181	-	0.00%	696	0.0%	-	-	-	-	-	-	-	-
Climate Zone 10	2,191	(1) 182949	0.05%	628	0.2%	416	416	0.32	30	30	$13,925	0.0346	0.07
Climate Zone 13	N/A	-	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Climate Zone 14	553	-	0.00%	0	0.0%	-	-	-	-	-	-	-	-
Climate Zone 15	91	-	0.00%	2	0.0%	-	-	-	-	-	-	-	-
Climate Zone 16	83	(1) 184986	1.20%	1	100.0%	819	819	0.62	219	219	$20,273	0.0439	0.42
CARB Communities	637	-	0.00%	170	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Financial													
CARE	4,983	(2) 182949/184986	0.04%	1,666	0.1%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
FERA	-	-	0.00%	2	0.0%	-	-	-	-	-	-	-	-
Disconnected	-	-	0.00%	-	0.0%	-	-	-	-	-	-	-	-
Arrearages	11	-	0.00%	771	0.0%	-	-	-	-	-	-	-	-
High Usage	4,983	(2) 182949/184986	0.04%	1,666	0.1%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
High Energy Burden	49	-	0.00%	6	16.7%	-	-	-	-	-	-	-	-
SEVI													
Low	902	-	0.00%	254	0.0%	-	-	-	-	-	-	-	-
Medium	2,762	(2)	0.07%	913	0.2%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
High	1,319	-	0.00%	499	0.0%	-	-	-	-	-	-	-	-
Affordability Ratio	4,365	(2)	0.05%	1,513	0.1%	1,235	1,235	0.47	124.5	124.5	$17,099	0.0403	0.13
Health Condition													
Medical Baseline	92	-	0.00%	23	0.0%	-	-	-	-	-	-	-	-
Respiratory													
Low	N/A	N/A	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Medium	N/A	N/A	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
High	N/A	N/A	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Disabled	N/A	N/A	0.00%	N/A	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

[1] Based on Year 1 Cohort

	A	B	C	D	E	F	G	H
1	**PY 2023 Low Income Programs Annual Report**							
2	**CARE Table 1**							
3	**Overall Program Expenses**							
4	**SOUTHERN CALIFORNIA GAS COMPANY**							
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	$ 4,566,299	$ 4,566,299	$ 4,566,299	100%	$170,115	Funds shifted to Outreach from Processing, Certification, Recertification
8	Processing, Certification, Recertification	N/A	$ 1,441,473	$ 1,441,473	$ 2,068,922	70%	($170,115)	Funds shifted from Processing, Certification, Recertification to Outreach
9	Post Enrollment Verification	N/A	$ 216,758	$ 216,758	$ 247,690	88%		
10	IT Programming	N/A	$ 907,959	$ 907,959	$ 1,090,222	83%		
11	Pilots	N/A	$ (16,436)	$ (16,436)	$ -	N/A		
12	CHANGES	N/A	$ 429,668	$ 429,668	$ 437,502	98%		
13	Studies	N/A	$ 10,843	$ 10,843	$ -	N/A		
14	Regulatory Compliance	N/A	$ 320,680	$ 320,680	$ 549,966	58%		
15	General Administration	N/A	$ 1,137,593	$ 1,137,593	$ 1,141,195	100%		
16	CPUC Energy Division	N/A	$ 47,552	$ 47,552	$ 79,568	60%		
17								
18	**TOTAL Program Costs**	**N/A**	**$ 9,062,389**	**$ 9,062,389**	**$ 10,181,364**	**89%**		
19								
20	CARE Rate Discount [2]	N/A	$ 263,781,436	$ 263,781,436	$ 136,819,016	193%		
21	Service Establishment Charge Discount	N/A	$ 2,523,721	$ 2,523,721	$ 3,982,900	63%		
22								
23	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**N/A**	**$ 275,367,546**	**$ 275,367,546**	**$ 150,983,280**	**182%**	**$ -**	
24								
25	[1] Reflects Jan-Dec 2023 authorized funding per D. 21-06-015 dated June 3,2021.							
26	[2] Total YTD subsidies and benefits exceeded annual authorized budget due to unusually high January bills.							

PY 2023 Low Income Programs Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

SOUTHERN CALIFORNIA GAS COMPANY

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type[5]			Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (Z/AA)
	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			
	Inter-Utility [1]	Intra-Utility[2]	Leveraging[3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																		
January	5,271	1,003	157	6,431	11,602	4,051	6,478	5	22,136	28,567	3109	23,167	10870	37,146	4681	18	211	9,674	14,584	65,713	13,983	1,102,242	664,746	28,519	1,795,788	1,613,587	111%
February	4,098	1,107	231	5,436	22,186	9,572	7,331	12	39,101	44,537	2901	23,827	9155	35,883	3602	32	280	9,965	13,879	80,420	30,658	1,124,566	672,528	29,071	1,826,446	1,613,587	113%
March	7,547	1,454	234	9,235	13,544	10,765	7,889	3	32,201	41,436	2841	40,093	9628	52,562	3284	99	243	12,678	16,304	93,998	25,132	1,144,114	677,813	29,370	1,851,578	1,670,113	111%
April	3,946	1,476	238	5,660	7,265	7,550	7,306	3	22,124	27,784	2406	26,142	22205	50,753	3023	462	261	11,688	15,434	78,537	12,350	1,152,751	681,187	29,709	1,863,928	1,673,671	111%
May	4,350	1,525	260	6,135	5,175	5,843	7,021	3	18,042	24,177	3763	25,496	5260	34,519	3460	612	317	12,019	16,408	58,696	7,769	1,158,233	683,419	29,764	1,871,697	1,673,671	112%
June	5,218	1,297	245	6,760	4,343	4,679	6,704	0	15,726	22,486	4178	26,574	3160	33,912	11272	459	347	13,254	25,332	56,398	-2,846	1,155,953	683,028	29,589	1,868,851	1,673,671	112%
July	5,104	1,358	233	6,695	4,926	4,678	6,642	0	16,246	22,941	4739	36,136	4,587	45,462	23422	180	354	13,283	37,239	68,403	-14,298	1,145,387	679,505	29,380	1,854,553	1,674,060	111%
August	5,020	1,402	230	6,652	5,798	6,350	6,840	2	18,990	25,642	8,837	31,623	9,972	50,432	10233	70	474	12,573	23,350	76,074	2,292	1,146,861	680,615	29,088	1,856,845	1,674,060	111%
September	4,729	1,268	259	6,256	5,391	7,492	6,805	2	19,690	25,946	16,304	54,469	3,962	74,735	7804	1582	895	11,242	21,523	100,681	4,423	1,149,920	682,124	28,943	1,861,268	1,674,060	111%
October	5,686	1,250	189	7,125	6,585	7,975	7,006	1	21,567	28,692	18,367	42,035	5,892	66,294	11,546	64	1348	13,969	26,927	94,986	1,765	1,151,667	682,710	28,375	1,863,033	1,675,824	111%
November	3,400	1,246	160	4,806	5,688	7,034	6,999	1	19,722	24,528	15,889	30,028	4,541	50,458	21,175	62	1305	11,946	34,488	74,986	-9,960	1,146,974	677,905	27,913	1,853,073	1,675,824	111%
December	3,153	1,201	103	4,457	6,584	7,869	7,105	2	21,560	26,017	15,739	31,264	4,429	51,432	30,202	57	1160	11,089	42,508	77,449	-16,491	1,138,161	670,619	27,521	1,836,582	1,675,824	110%
YTD Total	**57,522**	**15,587**	**2,539**	**75,648**	**99,087**	**83,858**	**84,126**	**34**	**267,105**	**342,753**	**99,073**	**390,854**	**93,661**	**583,588**	**133,704**	**3,697**	**7,195**	**143,380**	**287,976**	**926,341**	**54,777**	**1,138,161**	**670,619**	**27,521**	**1,836,582**	**1,675,824**	**110%**

[1] Enrollments via data sharing between the IOUs.

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

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

[4] No response includes no response to both Recertification and Verification.

[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 2023 Low Income Programs Annual Report

CARE Table 3A

Post-Enrollment Verification Results (Model)

SOUTHERN CALIFORNIA GAS COMPANY

Month	Total CARE Households Enrolled	Households Requested to Verify[1]	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible[5]	% of De-enrolled Customer Later Re-enrolled by Six Months	% of De-enrolled Customer Later Re-enrolled by Twelve Months	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	1,795,788	1,473	0.08%	35.64%	25.29%	8.27%	13.23%	607	58	665	45.15%	0.04%
February	1,826,446	6,138	0.34%	48.36%	20.42%	4.76%	7.39%	3,341	463	3,804	61.97%	0.21%
March	1,851,578	36,657	1.98%	56.46%	12.05%	3.99%	7.01%	23,818	2,594	26,412	72.05%	1.43%
April	1,863,928	9,855	0.53%	57.76%	11.81%	3.32%	6.22%	6,608	561	7,169	72.74%	0.38%
May	1,871,697	2,699	0.14%	55.91%	12.02%	3.56%	6.55%	1,744	165	1,909	70.73%	0.10%
June	1,868,851	2,644	0.14%	50.04%	26.69%	4.59%	8.09%	1,504	153	1,657	62.67%	0.09%
July	1,854,553	2,620	0.14%	49.56%	24.72%	4.54%	6.69%	1,463	122	1,585	60.50%	0.09%
August	1,856,845	2,720	0.15%	48.16%	18.34%	5.27%	6.40%	1,556	132	1,688	62.06%	0.09%
September	1,861,268	2,186	0.12%	48.63%	17.10%	7.24%	8.17%	1,277	118	1,395	63.82%	0.07%
October	1,863,033	2,616	0.14%	46.37%	21.76%	7.00%	7.00%	1,481	147	1,628	62.23%	0.09%
November	1,853,073	2,203	0.12%	48.93%	21.20%	5.32%	5.32%	1,331	97	1,428	64.82%	0.08%
December	1,836,582	2,303	0.13%	34.48%	25.08%	4.31%	4.31%	935	110	1,045	45.38%	0.06%
Total	**1,836,582**	**74,114**	**4.04%**	**53.25%**	**16.11%**	**4.30%**	**6.92%**	**45,665**	**4,720**	**50,385**	**67.98%**	**2.74%**

[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
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.
[5] Inclues Income Eligible only. Excludes Categorical and Categorical plus Income Eligible.

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)
PY 2023

Month	Total CARE Households Enrolled	Households Requested to Verify [1]	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	% of De-enrolled Customer Later Re-enrolled by Six Months	% of De-enrolled Customer Later Re-enrolled by Twelve Months	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 2023 Low Income Programs Annual Report**						
2	**CARE Table 4**						
3	**CARE Self-Certification and Self-Recertification Applications [1]**						
4	**SOUTHERN CALIFORNIA GAS COMPANY**						
5		**Provided [2]**	**Received**	**Approved [3]**	**Denied [4]**	**Pending/Never Completed [5]**	**Duplicates [6]**
6	**Total (Y-T-D)**	2,891,749	575,524	399,417	67,394	61,977	46,736
7	**Percentage**		100.00%	69.40%	11.71%	10.77%	8.12%
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 2023 Low Income Programs Annual Report**									
2	**CARE Table 5**									
3	**CARE Enrollment by County**									
4	**SOUTHERN CALIFORNIA GAS COMPANY**									
5	**County**	**Estimated Eligible**			**Total Participants**			**Enrollment Rate**		
6		**Urban**	**Rural [1]**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
7	Fresno	10,908	13	10,920	13,262	20	13,282	122%	160%	122%
8	Imperial	0	17,075	17,075	1	16,491	16,492	0%	97%	97%
9	Kern	14,495	30,105	44,600	18,589	34,917	53,506	128%	116%	120%
10	Kings	10	13,653	13,663	10	17,564	17,574	97%	129%	129%
11	Los Angeles	868,315	2,089	870,404	909,180	2,020	911,200	105%	97%	105%
12	Orange	190,713	0	190,713	193,667	26	193,693	102%	N/A	102%
13	Riverside	99,665	116,760	216,425	111,878	140,180	252,058	112%	120%	116%
14	San Bernardino	142,786	810	143,597	196,528	736	197,264	138%	91%	137%
15	San Luis Obispo	8,613	14,162	22,775	4,318	13,125	17,443	50%	93%	77%
16	Santa Barbara	33,846	716	34,562	34,171	774	34,945	101%	108%	101%
17	Tulare	9,969	44,733	54,702	13,695	56,861	70,556	137%	127%	129%
18	Ventura	54,189	2,200	56,389	56,466	2,103	58,569	104%	96%	104%
19	**Total**	**1,433,508**	**242,316**	**1,675,824**	**1,551,765**	**284,817**	**1,836,582**	**108%**	**118%**	**110%**
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
1	**PY 2023 Low Income Programs Annual Report**							
2	**CARE Table 6**							
3	**CARE Recertification Results**							
4	**SOUTHERN CALIFORNIA GAS COMPANY**							
5		**Total CARE Households**	**Households Requested to Recertify[1]**	**% of Households Total (C/B)**	**Households Recertified[2]**	**Households De-enrolled[3]**	**Recertification Rate %[4] (E/C)**	**% of Total Households De-enrolled (F/B)**
6	January	1,795,788	10,341	0.58%	7,269	3,721	70%	0.21%
7	February	1,826,446	9,301	0.51%	6,180	3,657	66%	0.20%
8	March	1,851,578	11,728	0.63%	7,378	5,082	63%	0.27%
9	April	1,863,928	14,493	0.78%	9,262	6,148	64%	0.33%
10	May	1,871,697	15,084	0.81%	9,291	6,574	62%	0.35%
11	June	1,868,851	17,276	0.92%	8,645	9,254	50%	0.50%
12	July	1,854,553	41,750	2.25%	22,006	20,776	53%	1.12%
13	August	1,856,845	47,157	2.54%	25,764	22,892	55%	1.23%
14	September	1,861,268	104,771	5.63%	59,578	48,817	57%	2.62%
15	October	1,863,033	68,471	3.68%	47,593	33,143	70%	1.78%
16	November	1,853,073	50,784	2.74%	30,465	21,743	60%	1.17%
17	December	1,836,582	47,960	2.61%	28,947	14,736	60%	0.80%
18	**Total**	**1,836,582**	**439,116**	**23.91%**	**262,378**	**196,543**	**59.75%**	**10.70%**
19								
20	[1] Excludes count of customers recertified through the probability model.							
21	[2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.							
22	[3] Includes customers who did not respond or who requested to be de-enrolled.							
23	[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.							

PY 2023 Low Income Programs Annual Report
CARE Table 7
CARE Capitation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

Contractor Name [1]	Contractor Type (Check one or more if applicable)				Enrollments [2]			Total Expenditures
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
Community Action Partnership of Orange County		X	X	X				
Sigma Beta Xi		X						
PACE – Pacific Asian Consortium in Employment		X	X	X				
Community Pantry of Hemet		X						
Community Action Partnership of San Bernardino		X		X				
LA Works		X						
Children's Hospital of Orange County		X						
LACDA		X						
YMCA Montebello-Commerce		X						
Sr. Citizens Emergency Fund I.V., Inc.		X						
Coachella Valley Housing Coalition		X						
HABBM		X						
Southeast Community Development Corp.		X						
Latino Resource Organization		X						
Community Action Partnership - Kern County		X						
Ventura Cty Comm Human		X						
Blessed Sacrament Church		X						
Hermandad Mexicana		X						
CSET		X						
Crest Forest Family and Community Service		X						
CUI – Campesinos Unidos, Inc.		X	X	X				
Veterans in Community Service		X	X	X				
MEND		X						
Catholic Charities of LA – Brownson House		X						
OCCC, Inc. (Orange County Community Center)		X						
Green Light Shipping	X							
APAC Service Center		X			34		34	$ 1,020
Visalia Emergency Aid Council		X						
Total Enrollments and Expenditures					**34**	**0**	**34**	**$ 1,020**

[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

[2] Enrollments reflect new enrollments only.

	A	B	C	D	E	F	G	H	I
1	**PY 2023 Low Income Programs Annual Report**								
2	**CARE Table 8**								
3	**CARE Participants as of Month-End**								
4	**SOUTHERN CALIFORNIA GAS COMPANY**								
5		**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Enrollment Rate**	**% Change [1, 2]**	**Total Residential Accounts**
6	**January**	N/A	1,795,788	N/A	1,795,788	1,613,587	111%	0.12%	5,734,892
7	**February**	N/A	1,826,446	N/A	1,826,446	1,613,587	113%	1.68%	5,738,943
8	**March**	N/A	1,851,578	N/A	1,851,578	1,670,113	111%	1.36%	5,743,209
9	**April**	N/A	1,863,928	N/A	1,863,928	1,673,671	111%	0.66%	5,746,513
10	**May**	N/A	1,871,697	N/A	1,871,697	1,673,671	112%	0.42%	5,748,361
11	**June**	N/A	1,868,851	N/A	1,868,851	1,673,671	112%	-0.15%	5,748,005
12	**July**	N/A	1,854,553	N/A	1,854,553	1,674,060	111%	-0.77%	5,747,687
13	**August**	N/A	1,856,845	N/A	1,856,845	1,674,060	111%	0.12%	5,749,741
14	**September**	N/A	1,861,268	N/A	1,861,268	1,674,060	111%	0.24%	5,752,130
15	**October**	N/A	1,863,033	N/A	1,863,033	1,675,824	111%	0.09%	5,753,654
16	**November**	N/A	1,853,073	N/A	1,853,073	1,675,824	111%	-0.54%	5,756,706
17	**December**	N/A	1,836,582	N/A	1,836,582	1,675,824	110%	-0.90%	5,759,644
18									
19	[1] Explain any monthly variance of 5% or more in the number of participants.								
20	[2] The SoCalGas population did not vary by a level of 5% or more in any month during 2022.								

PY 2023 Low Income Programs Annual Report
CARE Table 9
CARE Average Monthly Usage & Bill
SOUTHERN CALIFORNIA GAS COMPANY

Average Monthly Gas / Electric Usage
Residential Non-CARE vs. CARE Customers

Customer	Gas Therms Tier 1	Gas Therms Tier 2	Total
Non-CARE	22.55	14.13	**36.68**
CARE	18.83	9.05	**27.88**

Customer	Electric KWh Tier 1	Electric KWh Tier 2 and Above	Total
Non-CARE	N/A	N/A	**N/A**
CARE	N/A	N/A	**N/A**

Average Monthly Gas / Electric Bill
Residential Non-CARE vs. CARE Customers[1]
(Dollars per Customer)

Customer	Gas	Electric
Non-CARE	$83.80	N/A
CARE	$62.00	N/A

[1] Excludes master-meter usage.

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CARE Table 10

CARE Surcharge & Revenue

SOUTHERN CALIFORNIA GAS COMPANY

ELECTRIC

CARE Surcharge and Revenue Collected by Customer Class

Class	CARE Surcharge	Monthly Bill	Bill	Collected	Revenue Collected
Residential	N/A	N/A	N/A	N/A	N/A
Commercial	N/A	N/A	N/A	N/A	N/A
Agricultural	N/A	N/A	N/A	N/A	N/A
Large/Indust	N/A	N/A	N/A	N/A	N/A

GAS

CARE Surcharge and Revenue Collected by Customer Class

Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge[1]	Monthly Bill			
Residential	$1.73	$83.80	2.06%	$81,529,932	43.19%
Commercial	$21.85	$595.68	3.67%	$49,129,015	26.02%
Natural Gas Vehicle	$1,565.05	$19,714.14	7.94%	$8,728,283	4.62%
Industrial	$275.06	$2,018.21	13.63%	$49,399,799	26.17%

[1] Excludes CARE customers.

	A	B	C	D	E	F
1	**PY 2023 Low Income Programs Annual Report**					
2	**CARE Table 11**					
3	**CARE Capitation Applications [1]**					
4	**SOUTHERN CALIFORNIA GAS COMPANY**					
5	**Entity**	**Total Received**	**Approved [2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**
6	Orange County CDC	0	0	0	0	0
7	Sigma Beta Xi	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Cmty Pantry of Hemet	0	0	0	0	0
10	Cmty Svcs SBDO County	0	0	0	0	0
11	LA Works	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	LA County Development Authority	0	0	0	0	0
14	YMCA Montebello-Commerce	0	0	0	0	0
15	Sr Citizen Emergency Fund	0	0	0	0	0
16	Coachella Valley Housing Coalition	0	0	0	0	0
17	HABBM	0	0	0	0	0
18	SoEast Comm Dev Corp	0	0	0	0	0
19	Latino Resrce Organizatn	0	0	0	0	0
20	Community Action Partnership - Kern County	0	0	0	0	0
21	Ventura Cty Comm Human	0	0	0	0	0
22	Blessed Sacrament Church	0	0	0	0	0
23	Hermandad 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	34	34	0	0	0
33	Visalia Emergency Aid Council	0	0	0	0	0
34	**Total**	**34**	**34**	**0**	**0**	**0**
35						
36	[1] Includes sub-metered customers.					
37	[2] Includes new enrollments and recertification applications approved.					

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CARE Table 12

CARE Expansion Program

SOUTHERN CALIFORNIA GAS COMPANY

Participating Facilities by Month

2023	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	228	1,135	1,363	N/A	N/A	N/A
February	228	1,149	1,377	N/A	N/A	N/A
March	228	1,152	1,380	N/A	N/A	N/A
April	228	1,146	1,374	N/A	N/A	N/A
May	228	1,149	1,377	N/A	N/A	N/A
June	228	1,131	1,359	N/A	N/A	N/A
July	228	1,111	1,339	N/A	N/A	N/A
August	228	1,110	1,338	N/A	N/A	N/A
September	228	1,110	1,338	N/A	N/A	N/A
October	228	1,111	1,339	N/A	N/A	N/A
November	228	1,102	1,330	N/A	N/A	N/A
December	228	1,104	1,332	N/A	N/A	N/A

Average Monthly Gas / Electric Usage[1]

Customer	Gas	Electric
	Therms	KWh
Residential Facilities	27.88	N/A
Commercial Facilities	241.24	N/A

CARE Expansion Self-Certification and Self-Recertification Applications

	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	778	772	1	5	0
Percentage		99.2%	0.1%	0.6%	0.0%

[1] Excludes master meter usage.

	A	B	C	D	E	F	G	H	I	J
1	**PY 2023 Low Income Programs 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.									

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CARE Table 14

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 2023 Low Income Programs Annual Report**	
2	**CARE Table 15**	
3	**Categorical Enrollment**	
4	**SOUTHERN CALIFORNIA GAS COMPANY**	
5	**Type of Enrollment**	**Number of Customer Enrollments [1]**
6	Bureau of Indian Affairs General Assistance	78
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	63,268
8	CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	9,835
9	Head Start Income Eligible - (Tribal Only)	240
10	Healthy Families A&B	17,301
11	Low-income Home Energy Assistance Program (LIHEAP)	9,933
12	Medicaid/Medi-Cal	101,609
13	National School Lunch Program (NSLP) - Free Lunch	14,964
14	Supplemental Security Income (SSI)	9,403
15	Tribal TANF [2]	0
16	Women, Infants, and Children Program (WIC)	18,478
17		
18	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
19	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	

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CARE Table 16
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 Track) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)**
January	N/A	94.1%	49.2%	55.3%
February	N/A	97.1%	49.6%	64.1%
March	N/A	96.5%	49.1%	59.0%
April	N/A	94.3%	49.1%	59.0%
May	N/A	96.9%	49.3%	59.2%
June	N/A	96.2%	48.4%	58.6%
July	N/A	95.6%	49.0%	59.1%
August	N/A	95.9%	49.2%	58.8%
September	N/A	96.1%	49.2%	58.6%
October	N/A	95.3%	48.8%	58.0%
November	N/A	95.0%	48.1%	57.5%
December	N/A	93.5%	48.9%	58.1%
YTD	N/A	95.5%	49.0%	58.8%

Notes:
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.