

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

Application of Southern California Edison Company (U 338E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.

And Related Matters.

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

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

**ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2017**

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May 1, 2018

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This report presents the results and expenditures for Southern California Gas Company's (SoCalGas) California Alternate Rates for Energy (CARE) program and Energy Savings Assistance Program (ESA) for Program Year (PY) 2017. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's (Commission or CPUC) Energy Division (ED) with all the necessary information to analyze SoCalGas' low-income programs.

Respectfully submitted,

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Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

Annual Report

2017 Results

May 1, 2018

ENERGY SAVINGS ASSISTANCE PROGRAM & CARE ANNUAL REPORT

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ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

This report provides information on Southern California Gas Company's (SoCalGas) ESA Program¹ accomplishments and expenditures for PY2017. The ESA Program offers low-income customers weatherization services, energy efficient appliances, and energy education at no cost to qualified natural gas customers within its service territory.

In PY2017, SoCalGas ESA Program treated 93,790 homes, installing measures providing energy savings of 1,552,610 first-year therms. This significant increase in treated units, after treating fewer than 70,000 homes in 2016, was the result of rules changes adopted in Decision (D.) 16-11-022, the funding certainty provided by that decision, and the resulting ramp-up of capacity implemented by SoCalGas and its contractors.

SoCalGas worked throughout 2017 to implement the provisions of D.16-11-022.

These included:

- Development of a plan to provide multifamily common area measures through participation in the Multifamily Working Group (MFWG);
- Roll-out of the thermostatic tub spout measure which required the training and organization of contractors;
- Elimination of Go-Back and Three Measure Minimum (3MM) rules throughout the service territory, and development of prioritization

¹ The ESA Program was formerly known as the Low-Income Energy Efficiency (LIEE) Program.

strategies for go-back units;

- Development of conforming Advice Letters to finalize 2017-2020 budget requirements;
- Participation in other statewide processes including the Mid-Cycle Working Group (MCWG), Energy Education workshop and Marketing & Outreach (M&O) workshop;
- Initiation of High Efficiency (HE) Forced Air Unit (FAU) furnace measure to be implemented in 2018;
- Issuing of a Request for Proposals (RFP) to procure the Toilet Tank Efficiency Kit to be provided, along with other give-away collateral, to income-qualified households as part of the In-Home Energy Education program component provided at the time of enrollment; and
- Worked to develop the joint Investor Owned Utility (IOU) Multifamily Property Owner Authorization and Affidavit. The form was designed to meet several objectives; obtain owner authorization for in-unit measures, common area measures, owner certification of tenant eligibility, type of deed restricted building eligibility and the other types of energy efficiency programs the property may qualify for participation. Approval was obtained in late 2017. Implementation is expected in early 2018.

Over the course of 2017, SoCalGas improved efficiency by transitioning all contractors to paperless invoicing as well as a paperless, mobile-based enrollment process.

SoCalGas also continued to strengthen its partnerships with Southern California Edison (SCE), other IOUs, and other utilities and agencies.

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

In D.07-12-051, the Commission updated its policy objectives for the ESA Program stating:

“[T]he key policy objective for the LIEE Programs, like that of our non-LIEE Energy Efficiency Programs, is to provide cost-effective energy savings that serve as

an energy resource and to promote environmental benefits. Concurrently we retain our commitment to ensuring the LIEE Programs add to the participant's quality of life, which implicates, equity, energy affordability, bill savings and safety and comfort for those customers who participate in LIEE Programs.”²

To achieve these objectives, the CPUC adopted a programmatic ESA Program initiative (programmatic initiative) “to provide all eligible LIEE customers the opportunity to participate in LIEE Programs and to offer those who wish to participate all cost-effective energy efficiency measures in their residences by 2020.”³

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

In D.12-08-044, the Commission reinforced its key policy objective of making the ESA Program a reliable energy resource by adopting goals to treat one-third of SoCalGas’ willing and eligible households during program years 2012-2014.

Treated goals remained the same throughout this bridge period.⁴ During

² D.07-12-051 at p. 25.

³ *Id.*

⁴ SoCalGas also notes that certain elements of this annual report have been altered from prior versions to reflect information associated with the 2012-2014 program cycle. Such matters were determined in consultation with the Commission’s ED and the other IOUs as part of the charges of the mid-cycle working group established in D.12-08-044.

PY2016, D.16-04-040 was approved on April 21, 2016, which then suspended the Go-Back and the 3MM rules. This allowed for ESA Program contractors to enroll eligible customers who had been previously serviced to re-enroll if they were within the designated rules suspended area. SoCalGas continues to work towards meeting the CPUC-directed ESA Program goals and objectives, with the summary results for PY2017 provided in Section 1.2 below.

SoCalGas continues to offer a portfolio of measures deemed most cost effective in terms of energy savings and most valued in terms of benefitting the health, comfort, and safety of SoCalGas' low-income customers, and to adjust that portfolio as new measures and technologies become available, with an eye to the evolution of cost effectiveness metrics adopted by the Commission.

In response to directives set forth in D.16-04-040, SoCalGas identified all feasible high energy saving measures, including the HE clothes washer, Standing Pilot Retrofit Kit, Attic Insulation, and Furnace Clean and Tune. In addition, SoCalGas introduced the thermostatic tub spout as a new measure to expand on its water-saving measures mix and further develop its energy education modules to include web-based training. SoCalGas and SCE jointly developed an ESA Program Mobile Site supporting paperless enrollments to offer to its low-income customers. Coordination with other utilities, water agencies such as Los Angeles Department of Water and Power (LADWP), Community Services Department (CSD) and other marketing approaches continued as well.

D.16-11-022 also directed the IOUs to provide more detailed M&O plans and further clarifications on their budget requests. The Commission also directed an ESA Program-specific M&O workshop to occur after the filing date for the Statewide Integrated 5-Year Roadmap. On May 23, 2017, the IOUs provided presentations for their preliminary CARE and ESA Programs' M&O plans.

This M&O plan outlines the approach that SoCalGas will carry out to meet the CARE and ESA Program goals as set forth by the D.16-04-040, including recommendations proposed by parties, "such as better coordination between electric and gas only utilities, 'bundled' community engagement effort, and better budget tracking linked to performance metrics."⁵ Furthermore, the SoCalGas M&O plan is designed to optimize effective past initiatives, provide in-market messaging continuity and more efficiently connect with the residential target markets.

The SoCalGas M&O plan is designed to accomplish the following objectives:

- Increase awareness and customer understanding of SoCalGas Low-Income Programs;
- Communicate program offerings and benefits to pique customer interest; and
- Foster customer engagement and encourage program enrollment.

These efforts showcase SoCalGas' efforts to more effectively reach those customers that have proven most difficult to reach, including the multifamily

⁵ D.16-11-022, p.163

customers and to develop new techniques that will be necessary to reach those customers yet to be treated under the Commission's 2020 goal.

Furthermore, on December 14, 2017, the Commission issued Resolution (Res.) G-3532 approving SoCalGas' conforming Advice Letter filing. This Resolution ordered SoCalGas to file a "Tier 2 Advice Letter within 60 days with a clear plan and proposed budget to use remaining unspent funds, if necessary, to treat this population and propose new retreatment estimates as warranted."⁶ Per Res. G-3532, SoCalGas has filed its Advice Letter in early 2018 outlining a clear plan and budget proposal to address its strategy for enrolling all willing and eligible customers by 2020. A pilot is planned for 2018 to test various outreach and marketing approaches to target these customers. In addition, per D.16-11-022, SoCalGas has filed a Tier 2 Advice Letter by March 1, 2018 providing an implementation plan for multifamily common area activities, further expanding ESA Program benefits to additional multifamily building customers.

To assess ESA program effectiveness and efficiencies, the utilities periodically conduct various processes and studies such as the Low Income Needs Assessment (LINA), Impact Evaluation studies and the Annual Income Eligibility guideline updates. In addition, to ensure program measures and services remain

⁶ SoCalGas Res., G-3532, p.19

cost efficient, the utilities conduct program cost effectiveness tests, which include non-energy benefits (NEBs).

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

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020 ⁷	IOU strategy employed this program year
1.1: Strengthen program outreach using segmentation analysis and social marketing tools.	Continue to access and evaluate customer-behavior and energy savings; improve upon outreach to eligible communities.	<ul style="list-style-type: none"> In PY2017, SoCalGas utilized the process of subdividing low-income customers into identifiable segments. This allowed SoCalGas to design a marketing mix that was tailored to targeted customers based on socioeconomic demographics and psychographics that tracked customer behaviors and aligned with the customer's expectations. Five segments were created from this process and the analysis revealed that segment five is where most of the ESA Program and CARE customers were clustered. Segment five identified high indices of low-income, high credit and collections, low usage, and branch office payment methods. The execution of this analysis is listed in marketing and outreach section below. In PY2014-2017, SoCalGas continued to employ the Whole Neighborhood Approach (WNA) initiative to identify and reach targeted low-income customer segments by working with ESA Program contractors. WNA canvassing lists were requested by ESA Program contractors and delivered as a means of targeting high probability customers in self-certification PRIZM codes derived from segment five. This information is of high value to ESA Program contractors

⁷ California Energy Efficiency Strategic Plan, January 2011 Update. Section 2 – Page 25 and Section 2 – Page 27.

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020 ⁷	IOU strategy employed this program year
		<p>and is used to streamline the ESA Program enrollment process.</p> <ul style="list-style-type: none"> In PY2017, SoCalGas continued to utilize CARE source codes to identify and track newly enrolled CARE customer lists and CARE rate transfer customer lists to deploy monthly email campaigns. Customers on these two lists have a higher probability of being eligible for the ESA Program per segment five. In PY2017, SoCalGas continued to employ its strong marketing campaigns which included an overall Mass Media campaign. SoCalGas deployed an all digital bridge campaign which ran from August 21 to December 31 for the ESA Program, CARE, and Medical Baseline (MBL). The tactics included TV vignettes, print, out-of-home, radio, digital and social media. The goal of the media campaign was to increase awareness and drive enrollment participation of SoCalGas' Customer Assistance Programs. Energy usage information and targeted geographic locations (zip codes) were utilized to contact various customer segments to provide targeted ESA Program education. Additionally, SoCalGas ran these campaigns in the Los Angeles County, Orange County, San Bernardino County, Riverside County, Fresno County and Bakersfield areas.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Evaluate progress/refine strategy 	<ul style="list-style-type: none"> During PY2017, the following strategies have resulted in successful progress in developing and perpetuating a recognizable and trustworthy brand for Customer Assistance Programs:

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020 ⁷	IOU strategy employed this program year
		<ul style="list-style-type: none"> All ESA Program marketing and advertising campaigns (e.g., collateral, giveaways, direct mail, email, and social media) displayed the ESA Program logo brand. As well, SoCalGas has continued to make polo shirts, t-shirts, and vehicle magnets with the ESA Program brand insignia available to the ESA Program contractors for their use in outreach efforts. The bridge campaign, mentioned earlier, concentrated on the <i>You're Not Alone</i> tagline. This was a female focused creative displayed as "Mom as a household hero" and "Busy mom who finds time to help her family save money." This targeted the segment five demographics and used TV, radio, digital, social, and out of home media to advertise to Los Angeles, Orange and San Bernardino Counties. It ran in five different languages and drove 233,606 Customer Assistance Program page visits, an 18.2% increase from the beginning of PY2017. The metrics also showed that mobile access delivered the most landing page visits compared to desktops and tablets and that Spanish creative on social media was the most cost-effective. SoCalGas has continued to engage in co-branding efforts on joint IOU printed materials.
1.3: Improve program delivery.	<ul style="list-style-type: none"> Ongoing: Use information from segmentation analysis to achieve efficiencies in program delivery. Ongoing: Leverage with Local, State, and Federal agencies 	<ul style="list-style-type: none"> SoCalGas continued to work with their External Affairs department to secure information on city and county websites and to display materials in local government offices to promote the ESA Program. Additionally, SoCalGas' External Affairs department proactively provides marketing efforts to their regional areas in local broadcasts and through the use of

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020 ⁷	IOU strategy employed this program year
	as well as other organizations to increase seamless coordination, efficiency and enrollment.	<p>social media (Twitter/Facebook) to promote SoCalGas' Customer Assistance Programs to their local government contacts. As an example, in PY2017, KHTS radio broadcasted to all of Santa Clarita Valley and parts of Antelope Valley SoCalGas' CARE Program as well as "winter communication" to dial down and conserve natural gas usage. The interview was featured live on the radio, the radio's website, YouTube, and was tweeted/re-tweeted several times by the radio station and by SoCalGas' Regional Public Affairs team.</p> <ul style="list-style-type: none"> • SoCalGas has continued to work with Local Government Partnerships, including Council of Governments to disseminate information to its membership base and to present SoCalGas' Customer Assistance Program information at their meetings. • Community Based Organizations (CBOs) working with SoCalGas continued to utilize their intake processes to promote the ESA Program and CARE along with the other community services they provide. For example, in PY2017, SoCalGas worked with Mixteco Indigena Community Organizing Project (MICOP). This CBO serves Ventura County which has approximately 20,000 indigenous speakers (residents who speak neither English nor Spanish, but who speak various indigenous languages, such as Zapoteco or Mixteco). In order to provide outreach to these residents and customers, primarily farmworkers and persons with limited English proficiency, SoCalGas has collaborated with MICOP to extend awareness of the CARE Program through

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020 ⁷	IOU strategy employed this program year
		<p>each intake and event to highlight SoCalGas' Customer Assistance Programs.</p> <ul style="list-style-type: none"> • See 1.1 on PRIZM segmentation and WNA.
<p>1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.</p>	<ul style="list-style-type: none"> • Implement ESA Program workforce education and training • Coordinate ESA Program workforce and service providers with broader market 	<ul style="list-style-type: none"> • SoCalGas continued to provide ESA Program workforce education and training to its contractor network by offering trainings and refreshers both in a formal classroom setting at SoCalGas' Energy Resource Center (ERC) and at contractor's offices. Monthly classes are held for new program representatives, quarterly trainings for contractor back office personnel, and larger scale trainings are also provided to support new elements being implemented into the program that cover policies, processes, measures and program tools such the Home Energy Assistance Tracking (HEAT) System and the ESA Program Mobile site used for enrolling customers electronically into the program. • In-Home Energy Education enhancements included the development of a My Account insert to the Energy Education and Customer Resource Guide which Program Representatives distribute to qualified homes during the In-Home Energy Education part of the enrollment process. The insert provides step by step instructions on how to enroll in My Account along with the benefits and tools available to customers to help the manage their energy bills. • SoCalGas partnered with SCE to provide contractor personnel with access to an online computer based training tool to support their development of software skills applicable to the workforce. Courses offered included

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020 ⁷	IOU strategy employed this program year
		<p>Microsoft programs such as Word, Excel, Power Point, Access and other advanced programs such as Microsoft Project and SQL. These course offerings support the growth and development of contractor personnel equipping them with the skills to manage and administrate the ESA Program successfully.</p> <ul style="list-style-type: none"> • SoCalGas and SCE jointly developed an ESA Program Mobile Site to support paperless enrollments. The site went live in the second quarter of 2017 and by the end of the year over 80% of SoCalGas contractors enrolled customers 100% paperless. Contractors will be required to enroll all customers via the mobile site starting in January of 2018.

Please identify the IOU strategies employed in meeting Goal 2: Energy Savings Assistance Program is an Energy Resource

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services.	<ul style="list-style-type: none"> • Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> • SoCalGas has continued to perpetuate its ongoing partnership with the South Coast Air Quality Management District (SCAQMD) to improve indoor air quality by identifying homes at risk for exposure to high levels of localized criteria pollutants and diesel particulate matter emissions, conducting home assessments, and weatherizing homes along freeway corridors. Intermodal facilities will improve indoor air quality for residents and minimize exposure to pollutants. In addition, in PY2017, the We Expect Clean Air Now (WECAN) campaign launched, and forums throughout the Los

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020	IOU strategy employed this program year
		<p>Angeles freeway corridor cities were conducted. SoCalGas' Customer Assistance Program information was provided to the residents in these underserved communities along with information on how they can get involved with the campaign.</p> <ul style="list-style-type: none"> • In PY2017, SoCalGas has continued to employ a reciprocal promotional methodology between the ESA Program and CARE. Data is shared across programs to identify opportunities for enrollments (i.e., CARE participants not on the ESA Program and ESA Program participants not on CARE). This successful approach is anticipated to continue to be used in the future for SoCalGas. • In PY2017, SoCalGas continued their working relationship with the Catholic Charities of Orange County (CCOC) that helps eligible clients apply for CalFresh/Food stamp benefits through application assistance workshops offered monthly in Santa Ana, Orange, and San Juan Capistrano. The workshop educates attendees on the CalFresh application process as well as the ESA Program and CARE; the majority of attendees at the workshops are women. Both the ESA Program brochures and CARE applications are distributed regularly. • In an effort to promote the ESA Program, SoCalGas assisted its contractors with outreach whenever possible by providing WNA lists, collateral, and technical support. In PY2017, SoCalGas invited ESA Program contractors to SoCalGas sponsored events where they had an opportunity to share an

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020	IOU strategy employed this program year
		event booth and were able to create leads for customer enrollments.
<p>2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.</p>	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. 	<ul style="list-style-type: none"> SoCalGas has leveraged sponsorships of community events between the Customer Assistance Programs and other departments, by taking the opportunity to present the ESA Program and CARE information at community outreach events and by streamlining internal processes and leveraging new and innovative resources with regards to research and data including metrics and marketing. Examples of these efforts include partnerships with Energy Efficiency (EE) Program's Integrated Demand Side Management (IDSMD) for data and the Single Point of Contact (SPOC) model to reach and educate large housing portfolio owners and managers of low-income and general EE Programs. SoCalGas continued to participate in community forums with other utilities, water agencies, local municipalities and ESA contractors to maximize on-site education, and opportunities on comprehensive energy and water savings. This effort resulted in increased outreach and awareness of the ESA Program and CARE in PY2017. In PY2017, SoCalGas leveraged Home Energy Reports (HERs) to reach 125,022 low-income customers to: 1) educate them on their gas usage; 2) inform them of energy saving tips; and 3) when applicable, encourage enrollment in the ESA Program. SoCalGas was able to increase its outreach efforts from 2016 numbers by 57%.

Implementation Plan and Timeline		
Strategies	Long Term 2017 - 2020	IOU strategy employed this program year
2.3: Provide low-income customers with measures that result in the most savings in the Energy Savings Assistance Program.	<ul style="list-style-type: none"> Continue to evaluate opportunities to incorporate new energy efficiency measures into the ESA Program, e.g., plug-load reduction, new Heating, Ventilation and Air Conditioning (HVAC) technology. 	<ul style="list-style-type: none"> SoCalGas continued to provide all feasible measures to customers' homes. In PY2017, SoCalGas identified for installation, when feasible, high energy saving measures including the HE clothes washer, Standing Pilot Retrofit Kit, attic insulation, and furnace clean and tune. In addition, SoCalGas introduced the thermostatic tub spout as a new measure.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Continue to evaluate approach to determine whether additional segments are needed. 	<ul style="list-style-type: none"> See Section 1.1 above regarding the use of PRIZM codes to reach geographically concentrated eligible customer segments. PRIZM code profiles are available for customer accounts and are indicators of likely program eligibility and categorical eligibility.

1.2 Energy Assistance Savings Program Overview

SoCalGas' ESA Program serves all eligible low-income customers willing to participate in the program by providing all feasible ESA Program measures⁸ as determined through outreach and assessment and the installation process. In PY2017, the ESA Program treated a total of 93,790 homes,⁹ including 35,366 served for the first time since 2002 as SoCalGas

⁸ See D.08-11-031, at Ordering Paragraph (OP) 15.

⁹ Per D.02-12-019, the CPUC defines a "treated" home as an income-qualified home that has received any measure or service under the ESA Program, including energy education, compact fluorescent lamps, weatherization and appliances. Under the ESA Program, a treated home must receive all feasible measures for which it qualifies.

Footnote continued on next page

continued to make progress toward achieving the goal of providing services to every willing and eligible customer by 2020. In PY2017, the treated total was 85% of the annual homes treated goal of 110,000 as adopted in D.16-11-022, issued on November 10, 2016. Also in PY2017, a total of 97,664 homes were weatherized.¹⁰ Per AL 5111-B, SoCalGas recalculated the number of remaining willing and eligible untreated customers after 2016. The revised willing and eligible estimate is 406,818 customers.

Additionally, in PY2017, SoCalGas continued to implement D.16-04-040 which was approved by the CPUC in April of 2016 as a result of the Aliso Canyon Natural Gas Leak Emergency. Specifically, the SoCalGas ESA Program was allowed to suspend the Go-Back and 3MM rules within a designated area.¹¹ SoCalGas prioritized treatments and energy savings in the designated area. The geographical region consisted of Ventura County, Orange County, and the Los Angeles Basin.

SoCalGas continued to work diligently on intensification efforts in PY2017 in response to D.16-04-040 which resulted in 58,424 incremental treated units enrolled through rules suspensions and contributing 945,027 therms

¹⁰ Per D.02-12-019, the CPUC defines a “weatherized” home as a subset of treated homes, and are defined as income-qualified homes that have received any weatherized measures (e.g., weather-stripping and caulking) under the ESA Program.

¹¹ See D.16-04-040, at OP 3.

to the energy savings totals. Nevertheless, the ESA Program as a whole fell short of its annual treated goal and therms saved goal for PY2017.

Please note that, in its low-income monthly reports for June 2016 through December 2017, in Section 4, item 10a, SoCalGas referenced a 2015 monthly average of 55,878 therms. This figure inadvertently excluded the therm savings resulting from measure installations performed in 2015 on homes enrolled in an earlier year. The correct figure is 57,865 therms per month.

As part of its comprehensive services to eligible ESA Program participants, SoCalGas provided In-Home energy education to 70,992 customers; envelope and air sealing measure to 73,802 homes; attic insulation improvements to 4,795 homes; 92,535 homes received Domestic Hot Water measures; 27,990 furnace clean and tune measures; 13 FAU standing pilot change outs, and duct sealing weatherization measures to 1,273 homes. In addition, SoCalGas provided and/or serviced 16,135 appliances including 1,529 water heaters, 6,678 furnaces and 7,928 HE clothes washers. A total of 10,017 customers were classified as “ineligible” or “unwilling”¹² to participate in PY2017 which

¹² Ineligible & Unwilling is defined as leads that do not result in a customer enrollment based on one of the following reasons: customer refused; home does not meet minimum measure requirement; customer is moving; over income; owner refused for renter occupied single family; unable to provide homeownership documentation; or home weatherized under another program.

represents approximately 9% of the number of homes treated in PY2017.

The average per home lifecycle bill savings for the PY2017 ESA Program was \$114.65.

ESA Program expenditures and therm savings for PY2017 are reflected in the following summary table.

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

Program Summary			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget**	\$133,369,265	\$79,364,204	60%
Homes Treated	110,000	93,790	85%
Therms Saved	N/A	1,552,610	N/A

* Pursuant to D.16-11-022, the full year total budget has been updated to reflect Jan 2017 - Dec 2017. The Annual budget was approved in Resolution G-3532, D.16-11-022 and D.17-12-009.

** Reflects authorized levels; does not reflect fund shift transactions.

SoCalGas continues to prioritize providing a positive customer experience as a core objective for the ESA Program in PY2017. To help evaluate and manage customer satisfaction and program delivery, SoCalGas surveys customers quarterly so as to understand customer satisfaction with the ESA Program as a whole as well as to specific programs including enrollment, installation, and inspection visits. Customized evaluations are used to help ESA Program contractors understand customer viewpoints and to develop insight on ways to enhance and improve service delivery.

In PY2017, 46% of customers rated their overall quality of service as “excellent.” In addition, 56% rated their sign-up experience as “excellent,” 51% rated their quality of installation experience as “excellent,” and 63% rated their quality of inspection as “excellent.” SoCalGas maintains its commitment to work closely with its contractor network to drive program improvement and to pursue improvements to these customer service results.

1.3 Marketing, Education and Outreach

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

SoCalGas continued the use of Zip-7 codes (the five-digit postal zip code plus the first two digits of the four-digit zip code extension) methodology to target neighborhood enrollments in PY2017. This methodology provides a greater level of detail on a neighborhood rather than traditional five-digit zip codes. SoCalGas uses 200% of the Federal Poverty Level (FPL) as a factor to calculate the “estimated eligible” population in each Zip-7 area. SoCalGas extracted Zip-7 codes, identified smaller areas to target, and then used this data to create more refined canvass lists for contractors. Zip-7 codes also represent the highest level of detail included in the

demographic information provided to SoCalGas by Athens Research.¹³ In addition, in PY2017, SoCalGas continued to provide contractors with canvass lists utilizing PRIZM codes (as noted above, a data source that allows contractors to better determine the likelihood of a particular household's potential eligibility for participation in the ESA Program based on market characteristics). A set of instructions was also included with every canvass list provided to contractors. Contractors also received regular information updates at the ESA Program contractor meetings.

In PY2017, employing the WNA methodology, SoCalGas reached 6,336 customers. This method employs a geographic segmentation strategy that compares customer account numbers contained in Zip-7 and other canvass lists against SoCalGas' HEAT System, a database used for program tracking and reporting. This process determined if a particular household had previously been served by the ESA Program; households not yet served appear on canvass lists. Other useful information, such as a customers' CARE status, also appeared for the contractors' information. Additionally, WNA lists were used to provide contractors customer lists in the ESA Program intensification areas, including eligible go-backs, totaling to 817 customers in the following three counties: Los Angeles, Ventura, and Orange Counties.

¹³ Athens Research is a contractor that develops large and small area estimates of demographic eligibility on behalf of all the IOUs.

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

SoCalGas continued to evaluate its strategy for targeting customers based on energy usage, energy burden,¹⁴ and energy insecurity.¹⁵ SoCalGas also continued to employ the WNA methodology in PY2017 and reached high energy burdened customers without neglecting low-income customers with other energy needs. SoCalGas conducted WNA efforts to target low-income areas using PRIZM code demographic information on households, which can be analyzed according to geographic social groups¹⁶ and sorted on a scale from highest incomes to lowest incomes. The PRIZM code tool allows SoCalGas to analyze energy burden, assuming that the lowest incomes have the highest energy burden.

An additional methodology employed by SoCalGas for customer segmentation includes analyzing Advanced Meter usage data. In PY2017, SoCalGas partnered with behavioral economists from the University of Oxford and University of Chicago to use Advanced Meter data to assess behaviors impacting customer participation in the CARE and ESA Program. This test and control methodology was used to encourage and promote energy conservation across low-income customers in the

¹⁴ Energy burden is the ratio of customer energy bills to income.

¹⁵ Energy insecurity is related to late payments, and/or threatened service shut-off.

¹⁶ Urban, Suburban, Second City, Town and County.

SoCalGas service territory. Findings from this study correlated participation rates with differing communication messages.

Recommendations from this initiative will be applied to develop future segmentation strategies for low-income customer's energy usage and program participation habits.

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

The overall SoCalGas program delivery strategies employed in PY2017 remained consistent with previous years. In PY2017, focus was on the Hard-to-Reach low-income communities along with deployment refinement in the approach to multifamily segments. SoCalGas continued to leverage and share best practice approaches from partners, internal programs, other utilities, state agencies, and CBOs. As described above, SoCalGas targets ESA Program customers using tools such as PRIZM codes and WNA, recently enrolled CARE contacts, and customers participating in other low-income resource programs such as MBL, Gas Assistance Fund (GAF), and Low Income Home Energy Assistance. SoCalGas also uses demographics and segmentation to identify ESA Program customers to provide in-language and in-culture marketing and outreach.

In PY2017, SoCalGas purchased media advertising to reach many ethnic communities and utilized ethnic-owned media as a means to effectively reach those customers, spending over \$366,000 on ethnic media, with over \$197,000 of the paid ethnic media going to ethnic-owned media vendors. Along with the paid mass media and ethnic media advertising, SoCalGas participated in community events that attracted the attendance of low-income customers and also celebrated diversity in the community. In PY2017, SoCalGas participated in over 50 community events, with some at no-cost to SoCalGas, that provided program awareness on the ESA and CARE Programs.

SoCalGas continued to build partnerships with organizations that helped serve low-income customers in ethnically and socially diverse communities. Such partnerships included Catholic Charities of Orange County, CalFresh, 211 LA, 211 OC, Fiesta Educativa, Southern California Resource Center (SCRS), Campesina Radio, MIXTECO, Unity Shoppe, Foodbank of Santa Barbara and other non-profit organizations that understand locally diverse communities. By utilizing their connections and expertise in understanding their local ethnic communities, these partnerships assisted SoCalGas in promoting the ESA Program and CARE. Connections and partnerships with CBOs are crucially important not only to increase overall program awareness and enrollment, but also to assist when communicating with customers impacted by natural

disasters such as the Canyon Fires in Orange County and the Thomas Fires and mudslides near Santa Barbara to provide information about available assistance programs from SoCalGas. As a new initiative in PY2017, SoCalGas partnered with Cal State Northridge's Volunteer Income Tax Assistance (VITA) program to promote the CARE Program with the low-income and elderly population receiving tax preparation assistance from the university. All program tax preparers were trained on the CARE Program and the application process. Applications were provided to the program for completion during preparation.

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

In 2017, SoCalGas developed new training materials in collaboration with the IOUs to implement Enhanced Energy Education which launched in PY2017. As part of its ESA Program clear plan, SoCalGas is considering inclusion of the Smart Thermostat, as part of its program measures.

1.4 Energy Savings Assistance Program Customer Enrollment Evaluation

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

Through D.16-04-040, homes previously treated were allowed treatment through the elimination of the Go-Back rule. Homes treated as go-back units cannot be counted toward the 2020 goals, only those units treated as first touch treatments. In PY2017, SoCalGas enrolled and treated a total of 93,790 customers, of which 58,424, or 62% were go-backs. The remaining 35,366 treatments were first touch units representing SoCalGas’ PY2017 progress toward the 2020 goal.

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

In PY2017, SoCalGas continued to use Categorical Eligibility (CE)¹⁷ and self-certification¹⁸ as tools to streamline customer enrollments to the ESA Program. Both of these categories of eligibility decrease the required

¹⁷ Categorical programs include: Medicaid/Medi-Cal, Women, Infants, and Children Program (WIC), and the Low Income Home Energy Assistance Program (LIHEAP), Supplemental Nutrition Assistance Program, Tribal Temporary Assistance to Needy Families (TANF), Bureau of Indian Affairs General Assistance (BIA GA), National School Lunch.

¹⁸ In D.05-10-044 the CPUC allowed SDG&E and SoCalGas to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements enroll customers in the Energy Savings Assistance Program through self-certification, if those customers lived in areas where 80% of the households were at or below 200% of the FPL. In D.06-08-025, D.06-12-038, and D. 08-11-031, the CPUC allowed continuation of the self-certification process described above.

income documentation. With CE, customers who can provide documents validating participation in one of the designated state or federal assistance programs do not need to provide additional income documentation in order to enroll in the ESA Program and/or CARE.

Categorical Eligibility: SoCalGas' Regional Public Affairs and Media Relations departments continued to inform the public of the ESA Program, its enrollment process and requirements. The Media Relations department issues an annual press release on the updated income guidelines and accepted CE programs. SoCalGas continues to provide the list of CE programs on its company website (found at www.socalgas.com/assistance) and in its ESA Program brochures, which are printed in multiple languages. In PY2017, SoCalGas partnered with the Los Angeles County Department of Public Social Services (DPSS) to host a training for over 150 CalFresh Eligibility Supervisors and provided them with information on the CARE Program. As the DPSS case managers work with their clients to apply for CalFresh, they are providing them additional savings by sharing information on SoCalGas' Customer Assistance Programs.

Self-certification: In PY2017, SoCalGas conducted outreach and assessment refresher classes to its ESA Program contractors to help increase awareness of all customer and home eligibility requirements for

the ESA Program. These courses addressed topics related to the various methods to income qualify households such as self-certification, CE, CARE Post Enrollment Verification (PEV), or full documentation.

During PY2017, SoCalGas also enrolled 4,675¹⁹ customers through WNA. The WNA generated canvassing lead lists that were provided to ESA Program outreach contractors including the Zip-7 codes and the CARE PEV status. Zip-7 codes and CARE status helped streamline customer enrollments by highlighting households that met the self-certification criteria as adopted in D.05-10-044. In addition to WNA lead lists, contractors also used PRIZM codes to streamline their enrollment process through non-WNA efforts.

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

SoCalGas' treated total of 93,790 was short of the goal of 110,000 established in D.16-11-022. However, it is important to note the impact of a change adopted in D.16-11-022 that is reflected for the first time in this 2017 annual report.

¹⁹ This number is based on contractor inputs of enrollment "lead source" into the HEAT system. The WNA total treated number is based on a HEAT query that identifies all customers provided on WNA canvass lists that enrolled in PY2017.

Prior to D.16-11-022, SoCalGas relied on the Commission's definition of "treated" units based upon D.02-12-019 which states, "a 'treated' home is an income-qualified home that has received any measure or service under the LIEE Program, *including energy education*, compact fluorescent lamps (CFLs), weatherization and appliances."²⁰ On that basis, SoCalGas had included in its treated counts homes that were income qualified, enrolled and provided energy education, but had not yet received weatherization measures. Under that rule, homes that were awaiting a visit from an installation crew as of the end of the year, would have been counted as treated (and would likely ultimately become "weatherized" in the following year when the installation crew visited).

However, in D.16-11-022, the Commission ruled that the IOUs "shall not count a household as — 'treated' if provided energy education alone" (OP 11). As a result, SoCalGas has not included in its treated count for the 2017 annual report homes that had yet to receive measures as of the end of the year. This change has impacted the figure significantly. Under the D.02-12-019 definition of treated, which was the basis of prior annual report treated counts, the 2017 treated count would have been 99,860 – 6,070 units higher than the count under the new rule.

²⁰ D.02-12-019 at p.8 (emphasis added).

The 99,860 homes enrolled and 97,446 homes weatherized by SoCalGas in 2017 represent 43% and 40% respective increases over 2016 levels.

This rapid increase in production was made possible by the elimination of the Go-Back and 3MM Rules, and also required a significant expansion of SoCalGas contractor capacity. It takes time for contractors to recruit outreach and installation personnel and to license and train them.

Procuring trucks and equipment needed to support a larger workforce requires planning based on expectations about the future. The funding certainty provided by D.16-11-022 allowed these processes to ramp up substantially over the course of 2017.

A further 16-18% increase in total output above 2017 levels is needed to reach the 2018 goal of 115,500 treated. SoCalGas believes that this level of increase is possible in 2018 through the continuation of the processes of contractor capacity expansion that occurred in 2017.

SoCalGas continues to develop its M&O approach to optimize results under the new rules, including coordinating with the Statewide M&O plan, and conducting a joint low-income IOU M&O public workshop, implementing new M&O directives as ordered in D.16-11-022.

As required by G-3532, SoCalGas has proposed additional programmatic adjustments for implementation in 2018 in AL 5256, aimed at addressing

the 2020 goal provided in Public Utilities Code sec. 382(e). AL 5256 requested incremental funding to increase treated production above current goals, incorporate smart thermostats into SoCalGas' portfolio, and make IT and marketing adjustments necessary to organize SoCalGas' contractors to more effectively address the 2020 goal.

1.5 Disability Enrollment Efforts

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

The penetration rate for Disability enrollment efforts in PY2017 dropped to 12.55% from PY2016. As in previous years, SoCalGas shifted its focus toward targeting increased enrollments within other underserved areas such as the Inland Empire and coastal communities in PY2017. In addition, SoCalGas employed a liaison assigned to work with and expand SoCalGas' reach within the disabled community, leveraged existing relationships to expand organizations in which to target, worked with organizations serving the disabled community, provided educational materials, and facilitated information sessions. Some of SoCalGas' highlights for disability outreach in PY2017 included:

- Collaborated with Fiesta Educativa to promote Customer Assistance Programs and pushed enrollment at multiple events throughout the year;
- Second annual *Disability Pride Parade*: hosted a resource table with Customer Assistance Program collateral and promotional giveaways tailored to the disability community;
- *Abilities Expo*: delivered explanations and clarification to disabled customers, hosted a resource table with Customer Assistance

Program collateral and promotional giveaways tailored to the disability community;

- Rancho Los Amigos Rehab Hospital *Roll Around the Rancho* Health and Fitness event: hosted a resource table with Customer Assistance Program collateral and promotional giveaways tailored to the disability community;
- Triumph Foundation's *Wheelchair Sports Festival*: hosted a resource table with Customer Assistance Program collateral in print and electronic text format and promotional giveaways tailored to the disability community;
- *Long Beach VA Health Fair*: hosted a resource table with Customer Assistance Program collateral and promotional giveaways tailored to the disability community;
- *Alma Families Wellness Fair*: hosted a resource table with Customer Assistance Program collateral and promotional giveaways tailored to the disability community; and
- *Chinese Parents Association of the Disabled (CPAD) events*: hosted a resource table with Customer Assistance Program collateral and promotional giveaways tailored to the disability community.

In PY2018, SoCalGas will continue to enhance its reach by employing various practices and approaches to be in touch with the disabled community.

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

Braille booklets and large print brochures with ESA Program information were produced for vision-impaired customers and provided to customers during community outreach events. In addition, in PY2017 vision-impaired customers that did not read braille but had other means of reading electronic information were given a USB thumb drive with Customer

Assistance Program information in electronic text that was accessible with assistive reading devices. SoCalGas continues to improve its website to increase accessibility and the online experience to allow vision-impaired customers who use screen readers and similar assistive technologies to navigate and read its content. SoCalGas' My Account online bill pay system received the AA Seal of Approval from the Center for Accessible Technology for achieving AA accessibility standards in the "Account" section of the website in 2016. This section of the website contains information and explanatory videos on SoCalGas' Customer Assistance Programs.

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

Disability Enrollments			
Source	Total Enrollment	Disability Enrollment	% of Disability Enrollment
Campaign	1,039	113	10.88%
Capitation	104	6	5.76%
CARE Referral	1,524	41	2.69%
Customer Assistance Representatives Referral	164	8	4.88%
Direct Mail	498	77	15.46%
Energy Efficiency Referral	1,379	268	19.43%
ESA Mobile	56	8	14.29%
Gas Bill Insert	360	62	17.22%
HEAT Canvassing List	1,837	176	9.58%
InfoLine 211	68	4	5.88%
Joint Utility Data sharing	1,036	213	20.56%
Joint Utility ESA Program, SCE	243	54	22.22%
LIHEAP	120	42	35.00%
Media/Leveraging Dept./Event	28	8	28.57%

Muni	11	2	18.18%
Neighbor/Friend/Relative Referral	1,992	364	18.27%
Newspaper/Radio/Television	45	5	11.11%
Other Utility or Municipality Referral	1,973	463	23.47%
Outreacher - Canvassing	70,282	7,749	11.03%
Received services at another location	152	22	14.47%
REN Referral	52	5	9.61%
SoCalGas – Gas Assistance Fund/Medical Baseline	26	3	11.54%
SoCalGas - Internet	691	120	17.37%
SoCalGas Referral	2,410	635	26.35%
SoCalGas Email	125	20	16.00%
Telemarketing - Telephone	4,143	773	18.66%
Univision - Telethon	8	1	12.50%
WNA approach	3,415	529	15.49%
WNA Census Self Cert	9	2	22.22%
Total	93,790	11,773	12.55%
Target Enrollment			15.00%

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

Although the penetration rate for disabled enrollments fell below the 15% goal in PY2017, many efforts were pursued to enhance and expand outreach in the community. For example, SoCalGas partnered with several organizations such as Fiesta Educativa, Westside Center for Independent Living, and Southern California Rehabilitation Services that are trusted sources and provide special resources for these communities. SoCalGas' partnership included sponsoring key events, presenting at workshops, and providing program materials at local offices as well as staff providing materials during one-on-one visits with community members and at local community events.

Additionally, disability enrollments are tracked by contractors who may not be aware of a customer's disability at the time of enrollment, particularly if the customer does not self-disclose their disability at the time of enrollment. However, in PY2017 there was increased collaborative partnerships that worked towards enrolling individuals with disabilities that may qualify for the ESA Program, CARE, or MBL. As in previous years, SoCalGas has continued to focus its efforts in the Inland Empire, Ventura, and Santa Barbara areas to reach special needs customers and continued working on establishing relationships with CBOs in these areas. Going forward, contractors will continue to be engaged at more disability outreach events to generate and track related ESA Program leads from events serving customers with disabilities.

1.6 Leveraging Success Including LIHEAP

D.08-11-031 defined leveraging as “an IOU’s effort to coordinate its ESA Program with programs outside the IOU serving low-income customers. These include programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low-income households.” In PY2017, SoCalGas continued to leverage resources to support low-income customers. Success is measured by tracking the following criteria:

- **Dollars saved:** Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU. Shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of

installation, replacement and repair of measures, among others are just some examples of cost savings to the IOU.

- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.
- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.
- Please refer to ESA Table 14 for additional details.

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

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

The participating agencies that provided SoCalGas' ESA Program dollar savings, energy savings/benefits, and measure leveraging agreements that included co-funding of HE clothes washers in PY2017 are:

- Eastern Municipal Water District²¹
- Fontana Water Company²²

²¹ Cities in the Eastern Municipal Water District service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula.

²² Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.

- Liberty Utilities, formerly Park Water Company²³
- Metropolitan Water District²⁴
- San Gabriel Valley Water Company²⁵

As a result, co-funding from all water agencies totaled \$586,694 in PY2017.

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

- Anaheim Public Utilities
- LADWP
- Pasadena Water and Power
- Riverside Public Utilities

²³ Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.

²⁴ 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.

²⁵ San Gabriel Valley Water Company serves the communities of: Arcadia, Baldwin Park, El Monte, Industry, Irwindale, La Puente, Montebello, Monterey Park, Pico Rivera, Rosemead, San Gabriel, Santa Fe Springs, South El Monte, West Covina, Whittier and unincorporated portions of Los Angeles County, in the communities of Bassett, Hacienda Heights, Los Nietos and South San Gabriel.

Municipal Utility	Number of Units Served
Anaheim Public Utilities	735
Pasadena Water & Power	64
Riverside Public Utilities	0
Los Angeles Department of Water & Power	8,151
Total	8,950

In 2017, Riverside Public Utilities was in the process of revamping their program and had no activity. Some of the electric measures installed via the collaborative effort included LED bulbs, Smart Power Strips, LED Torchiere Lamps, A/C Tune-ups, Refrigerator Assessments, Duct Testing & Sealing, and Room A/C Replacement. Qualifying measures varied per electric provider and availability of funding.

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

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

In PY2017, SoCalGas collaborated with SCE, LADWP, Anaheim Public Utilities and Pasadena Water & Power to create a Water-Energy Nexus program that would augment SCE and SoCalGas programs by adding water saving devices, develop combined marketing materials, focus efforts on high potential customers plus those in disadvantaged communities,

and add an educational component on the Water-Energy Nexus in California. Success with this endeavor will provide a model for future direct-install partnerships between SCE and SoCalGas and other water retailers for their mutual customers. The combined marketing efforts of the five utilities and the enhanced customer targeting element is the differentiating factor from the other marketing endeavors. Another benefit of this program to eligible customers is that they will experience less disruption because the installation of the new devices is performed by the same installer for both water and energy savings. A targeted outreach approach will yield the greatest water and energy savings by locating the oldest dwelling units without prior participation in water or energy efficiency programs.

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

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

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

CSD Data Sharing: Per D.17-12-009, Attachment 1, OP 183, SoCalGas and CSD entered into a non-disclosure agreement (NDA) for data sharing purposes. This fully-executed NDA allowed for data sharing to begin as required in D.17-12-009. CSD confirmed that their first data share request met all terms within the agreed upon NDA. SoCalGas' first data share included CSD-requested customer-specific usage data. SoCalGas, CSD, and the other IOUs are in discussion to determine frequency of future data sharing efforts, along with other possible technological mechanisms to make this data sharing as seamless as possible.

CSD MF LIWP Leveraging: D.16-11-022 required SoCalGas to fund ESA Program measures currently offered by the ESA Program for multifamily customer households participating in CSD's MF LIWP Program.

SoCalGas worked with CSD to project installation rates for these measures, including SoCalGas costs for both labor and the measures.

The funding level was projected for this effort, with the goal of funding the CSD's MF LIWP efforts for those in-unit measures provided by the ESA Program, thereby preserving the remaining CSD's funding for use to install central systems and common area measures not provided by the ESA Program. SoCalGas' budget for this effort was included in its conforming Advice Letter submitted on March 30, 2017, and supplemented on April 4, 2017, and was authorized by Commission Res. G-3532 issued December 21, 2017. Since working with CSD to develop a budget for LIWP leveraging efforts, SoCalGas ESA Program Management, Legal, and Supply Management have been actively working with CSD teams to complete contract/agreement terms necessary to begin leveraging funds. SoCalGas expects to begin implementation in 2018.

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

SoCalGas leveraging opportunities maximize joint energy collaboration for comprehensive natural gas, electric and water savings. SoCalGas' ESA Program has administrated co-funding opportunities and program support

with numerous water agencies. These efforts promote collaboration and allow for comprehensive savings to be captured and reported.

- Metropolitan Water District (MWD) signed a \$1.5 million agreement with SoCalGas to co-fund HE clothes washers throughout their joint service territories.
- Irvine Ranch Water District (IRWD), SCE and SoCalGas launched a joint energy collaborative/water nexus, teaming up to save water and energy and help the customer save money. The effort emphasizes that, “It takes energy to heat water, energy to move water and energy to clean water. It takes water to make electricity. Saving water, saves energy.” This collaboration is a “one-stop shop” approach to integrating natural gas, electricity and water savings.

1.7 Integration Success

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

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

Data Sharing: The ESA Program shares data with the CARE Program.

New ESA Program customers are automatically enrolled for the CARE discount and are exempted from PEV if their income eligibility has been verified by the ESA Program. Targeted marketing campaigns for the ESA Program also utilize lists of all eligible CARE customers who have not received ESA Program services. During PY2017, SoCalGas’ ESA Program outreach continued a direct mail campaign targeting all new customers who were automatically enrolled onto CARE. This campaign

targeted the segment of low-income customers who recently moved into a new residence and may be eligible for ESA Program measures.

Integrated Voice Recognition (IVR): Multi-lingual ESA Program and CARE messages are made available on SoCalGas' main call center IVR system. If a customer is establishing a new gas-service account, they will hear an automated message that includes information on Customer Assistance Programs including: CARE, the ESA Program, and MBL. This message is also reinforced by live customer service representatives when customers call-in to discuss bill payment arrangements.

Branch Payment Offices: ESA Program and CARE information is displayed and is available at SoCalGas' 44 branch payment offices. When income guidelines are updated each year, all branch offices receive new brochures, which are regularly replenished. Branch Payment Office Clerks are trained to promote both the ESA Program and CARE.

Customer Contact Center: SoCalGas Customer Service Representatives (CSRs) provide information regarding Customer Assistance Programs to facilitate enrollment of eligible customers. Customers are informed about CARE on every call that is routed to initiate gas service or when making payment arrangements. When a customer inquires about the ESA Program, a direct 800 telephone number is also

provided. In addition, SoCalGas offers information on integrated programs for residential customers by mailing a conservation package during customer contact center bill inquiries; the package includes information on the ESA Program, CARE, MBL, EE rebates, energy-saving tips to help customers manage their gas bills, and is paired with information regarding CSD Programs.

Email Campaigns: SoCalGas deployed email campaigns in which both the ESA Program and CARE were promoted to new SoCalGas customers. New CARE customers with email addresses were encouraged to apply for the ESA Program via these email campaigns that feature ESA Program services and includes links to drive customers to the online ESA Program request (lead) form.

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

Winter Media Campaign: The ESA Program and CARE were promoted as part of the *Bridge Campaign* to bring awareness to customers who are eligible to enroll and have not participated in these programs.

Outreach by Field Employees: Field service employees distributed Customer Assistance Program brochures to customers during each service visit at the customer's home. In PY2017, SoCalGas employees that entered customer homes left nearly 500,000 brochures.

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

In PY2017, SoCalGas continued to employ the Single-Point-of-Contact (SPOC) model. As noted in section 1.6.1, in 2017, the partnership with LADWP has allowed the SoCalGas SPOC team to enroll and serve 8,100 low-income multifamily (MF) units through SoCalGas' ESA Program, where these units received both SoCalGas- and LADWP-funded measures. Additionally, the SPOC team has continued in engaging cross-portfolio work with numerous affordable housing portfolios. The SPOC team is currently engaged in presenting cross-portfolio energy and water efficiency recommendations to 20 housing portfolios, representing over 900 total properties with over 60,000 total affordable units. In 2017, the SoCalGas SPOC team also delivered three ESA Expanded Measure Pilot program enrollments. Site audits at these sites have been commissioned with common-area retrofit recommendations to follow.

SoCalGas continued to adhere to the following four best practices for collaborating with large multifamily customers in delivering deep, cross-portfolio energy/water savings: 1) aligning integrated project retrofits with

facility management requirements to identify viable projects; 2) providing Residential Segment SPOC services to customers; 3) integrating utility programs by streamlining program application processes; and 4) developing a roadmap for attaining additional program enrollments and savings over time.

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

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

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

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

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

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

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

In PY2017, the SoCalGas SPOC worked closely with Weiss Family Properties (Weiss), whose properties were enrolled in the ESA in-unit and the ESA Expanded Measure Pilot program offerings, among many other SoCalGas and LADWP energy efficiency programs. With 144 property locations in California, Weiss property sites were able to achieve significant natural gas, electric, and water savings through the no-cost in-unit ESA Program measures, including low-flow showerheads, kitchen aerators, bathroom aerators, pipe wrap for the hot water distribution system, and high-efficiency in-unit lighting courtesy of LADWP. Additionally, with the support of the Residential Segment SPOC, Weiss was also able to take advantage of several other EE-funded program offerings, such as SoCalGas' Multifamily Direct Therm, On-Demand Efficiency Programs, and California Solar Initiative and LADWP's Commercial Direct Install Program.

In summary, during 2017, SoCalGas continued to collaborate with customers, utility partners, and program implementers to identify comprehensive energy and water efficiency solutions that meet unique customer needs. These collaborative efforts provided a model for how utilities could work with various multifamily ownership structures to generate deep and sustainable energy and water savings. A joint-utility effort between SoCalGas and LADWP helped streamline program participation to offer customers with combined gas, electric, and water efficiency incentives and services. The SoCalGas Residential Segment SPOC served as an important linkage in the process by ensuring that customers receive all available services and financial assistance the customers can qualify for, and that the customers receive these services and offerings in a seamless fashion.

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

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

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

As part of the Integrated Demand Side Management (IDSM) directive and ESA Program MF strategy, SoCalGas' ESA Program expanded its outreach to MF building owners and managers to gain connections within the non-profit affordable housing marketplace. Please refer to section 1.7.2 for additional highlights.

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

SoCalGas is not currently integrating ESA with Demand Response during PY2017. As natural gas Demand Response programs expand, SoCalGas will work to integrate with ESA, particularly through the smart thermostat offerings, as approved.

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

The California Solar Initiative (CSI), Solar thermal pilot program concluded in PY2014. In PY2017, SoCalGas' ESA Program coordinated marketing efforts with CSI at the Eastside Sol event in Los Angeles. The community event celebrated art, music, and provided a healthy environment for families and residents to learn about and participate in clean energy demonstrations and pilot projects. SoCalGas plans on continuing this program again in PY2018.

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

- SoCalGas processed to date 859 single family low-income applications, totaling \$3.9M in incentives and equating to 100,000 in expected therms saved annually. Approximately 1,000 applications are pending review.
- For SoCalGas multifamily low-income customers, 380 applications were processed, totaling \$12.6 M in incentives and equating to over 609,000 therms of expected energy savings.

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

This section is not applicable to SoCalGas.

1.8 Workforce Education & Training

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

Throughout 2017, SoCalGas worked with its Contractor Network to promote the growth of a trained workforce. SoCalGas enhanced its ESA Program workforce education and training by continuously improving the delivery and offerings of its trainings of program services. SoCalGas utilized CBOs and private contractors to provide program services,

including Enrollment and Assessment (E&A), HVAC, weatherization, and inspection services.

In PY2017, SoCalGas took a much more direct approach than in previous years to tailor the training provided to its contractors. By tracking and analyzing the types of questions sent in to SoCalGas' Enrollment Review Inbox, SoCalGas was able to identify the most common issues and questions being submitted not only overall but also by individual contractor. This allowed SoCalGas to tailor the Refresher classes to ensure the most common issues were addressed. This also helped SoCalGas prepare their contractor visits with answers and solutions to the most common type of errors or questions being submitted by their personnel. This information was also used to enhance the portions of the E&A training where Program Representatives had the most questions throughout the year. SoCalGas used contractor questions as a tool to better assist and prepare the Program Representatives who enroll customers into the ESA Program.

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

In PY2017, SoCalGas sustained its effort in enhancing the Energy Education curriculum by incorporating Program Representatives training on how to enroll customers into SoCalGas' My Account. This training was supplemented with an insert for its Customer Energy Education and Resource Guide provided to qualified customers during the delivery of In-Home Energy Education as part of the enrollment process. The insert provides step by step instructions on how to enroll a customer into My Account, the benefits of using My Account, and the additional resources available to customers through My Account to help them better manage their energy bills. The insert helps to not only promote paperless billing but also enhances the knowledge of Program Representatives, giving them the ability to in turn increase the quality of the In-Home Energy Education that program participants receive.

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

In PY2017, SoCalGas provided an array of training courses including initial E&A, In-Home Energy Education, Natural Gas Appliance Testing (NGAT), various refresher training, HEAT System and ESA Program Mobile site training. These are all designed to provide thorough and technical training to its ESA Program workforce. While all training courses convey the importance of the utility-specific requirements and expectations for customer interactions with participants, each course also supported the development of expert ESA Program knowledge at all levels

and stages, from front line to back office, and from newly hired to a tenured personnel.

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

After successful completion of the Skill Level Test, potential Outreach Specialists attend a mandatory 4-day class which reviews the requirements for E&A. The 4-day class covers utility-specific items related to policies, security processes and overall customer service standards, as well as leveraging opportunities amongst other low-income programs. A final exam must be passed, as well as attendance at a 1-day Energy Education Workshop. The Energy Education Workshop covers topics such as ways to help customers decrease energy consumption through changes in practices, cold and hot water conservation practices, and impacts of individual energy efficiency measures offered through the ESA Program. In addition to having completed and passed all of the required

trainings and tests, an individual must have an active Home Improvement Sales Registration with the California State Licensing Board for an Outreach Specialist to be eligible to receive a SoCalGas badge. The total number of newly badged outreach specialists for SoCalGas in PY2017 was 102. The classes are held at SoCalGas' ERC facility located in Downey, California, contractor's offices and offsite locations as requested by contractors.

Type of training or recruitment conducted	Students¹ attended	Students² eligible
Skill Level Test ³	281	209
Enrollment & Assessment Class ⁴	135	121
¹ SoCalGas does not hire employees to provide outreach and assessment or weatherization services. The students that attend classes are recruited by SoCalGas ESA Program contractors. ² Students eligible refers to those who passed the necessary exams and/or are badged and thus, eligible to perform the job function related to the training. ³ Individuals are required to pass the skill level test to be eligible to take the Enrollment & Assessment Class. ⁴ Employees eligible refer to those individuals who received an ESA Program badge upon successful completion of the Enrollment & Assessment Class.		

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

work under the SoCalGas ESA Program. This is in addition to a review of customer service standards and expectations. The table below summarizes field training efforts for PY2017.

Class Type	Number of Students	Number of Classes
Weatherization and HVAC Initial ¹	186	26
Weatherization Refresher ²	318	18
NGAT	343	20
¹ SoCalGas did not track separately the number of HVAC students or classes in 2017 as this information was covered in the initial Weatherization training. ² Weatherization Refreshers were conducted throughout the year at contractor's offices as needed.		

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

In 2017 SoCalGas also provided in-office contractor training to address issues affecting specific contractors. Providing one-on-one support to the

back office personnel helped SoCalGas understand their challenges and allowed SoCalGas to work closely with them to provide solutions. In-office trainings helps better assess contractor needs and tailor the trainings provided by SoCalGas to support the growth and development of the contractor workforce.

1.9 Legislative Lighting Requirements Status

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

1.10 Studies

1.10.1 For each Study, provide 1) 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.

Four statewide studies were proposed by the IOUs for the 2015-2017 ESA Program cycle following the procedures in the Guidance Document issued in D.14-08-030. These statewide, joint IOU studies were: 1) a Low Income Needs Assessment (LINA) study; 2) an Impact Evaluation of the 2015 ESA Program (Impact Evaluation); 3) a Non-Energy Benefits (NEB) and equity criteria evaluation; and 4) a Phase II ESA Program Energy Education study. D.16-11-022 authorized three of the proposed studies: the LINA study, the Impact Evaluation, and the NEB study. The Phase II ESA Program energy education study was not authorized. The three authorized studies are discussed below.

TABLE 1.10.1 PROVIDES AN OVERVIEW OF THE PROPOSED 2015-2017 ESA PROGRAM STUDIES. TABLE 1.10.1: 2015-2017 PROPOSED ESA PROGRAM STUDIES¹

Proposed Program Studies	Lead Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report Due
Low Income Needs Assessment Study	Research Into Action	SCE	2/14/2018	TBD	12/2019
ESA Program PY2015-2017 Impact Evaluation	DNV GL	SCG	1/26/2017	9/6/2017	Phase 1: 3/30/2018
Non-Energy Benefits and Equity Criteria Evaluation	TBD	SDG&E	2018	TBD	2018

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

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

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Budget	SoCalGas Budget ¹
2019 Statewide LINA	Research Into Action	SCE	2017	2019	\$500,000	\$31,250
PY2015 Statewide ESA Program Impact Evaluation	DNV GL	SoCalGas	2017	TBD	\$550,000	\$34,375
Statewide NEBs Study	TBD	SDG&E	2018	2018	\$150,000	\$0
ESA Program Portion of the Statewide Energy Efficiency Potential Study	Navigant	N/A	TBD	TBD	\$300,000	\$50,000
Rapid Feedback Research & Analysis ²	TBD	N/A	TBD	TBD	N/A	\$0
Total					\$1,500,000	\$115,625

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

² Rapid Feedback Research & Analysis is not a statewide study. Each IOU has its own budget with which to propose research.

Statewide Low Income Needs Assessment (LINA) Study

The LINA Study is mandated to be updated every three years per AB 327 and Public Utilities Code section 382(d). Energy Division and the IOUs held a public workshop on May 19, 2017 to discuss the scope of work for

the LINA authorized in D.16-11-022, and the IOUs released a RFP for this work in the fourth quarter of 2017. A contract with Research Into Action was completed in the first quarter of 2018. A workshop will be held once a research plan has been developed. The 2019 LINA Study will be completed by December 2019.

Statewide ESA Program Energy Savings Impact Evaluation

Current ESA Program impacts are necessary for planning the next program cycle, and following the direction of Energy Division, the IOUs issued an RFP to conduct the time-sensitive ESA Program impact evaluation in November 2015. The bid was awarded in February 2016, pending authorization of the study by the Commission. The contract for this work was finalized after D.16-11-022 authorized the study. DNV-GL is conducting the statewide ESA Program impact evaluation. Work began in 2017 and a study initiation meeting was held in February 2017. Phase 1 results are anticipated in the second quarter of 2018, to be used in the Mid-Cycle Update Advice Letter filing on July 16, 2018.

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

The scope of work for the ESA Program NEB Study was developed in consultation with the Cost Effectiveness Working Group in 2017. SDG&E is the project manager for this statewide study and an RFP and contract award are anticipated in the first quarter of 2018.

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

SoCalGas did not complete any studies in PY2017.

1.11 Pilots

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

SoCalGas did not undertake any pilots in PY2017.

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

This section is not applicable to SoCalGas.

1.12 “Add Back” Measures

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

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

The inclusion of “add backs” in PY2017 treated homes did not impact

SoCalGas’ ability to reach customers or to install measures. With carry-

forward funding available throughout the year, “add backs” did not pose any budgetary challenges. For the 2017-2020 cycle, D.16-11-022 provided the opportunity to adjust budgets to accommodate ordered changes to the measure portfolio, including the retention of the duct sealing weatherization measure. Budgets for all current measures including “add-backs” were requested in SoCalGas’ application and conforming Advice Letters and approved in D.16-11-022 and G-3532; thus “add backs” will not impact SoCalGas’ ability to treat homes or install measures going forward.

1.13 Low Income Working Groups

D.12-08-044 authorized Energy Division to form three Working Groups during the 2012-2014 program cycle: 1) the ESA Program Cost-effectiveness Working Group; 2) the ESA Program Workforce, Education and Training Working Group; and 3) the Mid-Cycle Working Group to review those components of the Commission’s ESA and CARE Programs and to make recommendations for refinements to improve, wherever possible, the design, administration, delivery and ultimate success of these programs. D.16-11-022 re-convened the Cost Effectiveness and Mid-Cycle Working Groups and convened a new Multifamily Working Group. 2017 Working Group activity is summarized below.

ESA Program Cost Effectiveness Working Group (CEWG): D.16-11-022

instructed the CEWG to reconvene and address the tasks outlined below. The members participating in the Working Group include representatives from the

following organizations: CPUC Energy Division, CPUC Office of Ratepayer Advocates, National Resources Defense Council, The Utility Reform Network, TELACU/ACCES/Maravilla, Synergy Companies, SCE, PG&E, SoCalGas, and SDG&E.

- Submit a proposed schedule and work plan to the low-income proceeding service list no later than 60 days after the date of Decision approval;
- Provide recommendations on the following issues to be used to inform the next program cycle; these recommendations or a progress report are to be distributed to the service list no later than the second quarter of 2018;
 - Identify measures to include/exclude in the adjusted ESACET;
 - Determine how to exclude administrative costs and NEBs associated with excluded measures from the adjusted ESACET including program costs not tied to a specific measure;
 - Determine how to allocate administrative costs and NEBs across program measures;
 - Determine how to incorporate revised NEB values into the adjusted ESACET;
 - Determine if and how to incorporate into the ESACET benefits and costs for ESA Program investment in other programs such as demand response; and
 - Work with the IOUs to who will be conducting a NEB study.

The first item was submitted to the service list on January 11, 2017. The CEWG met monthly through 2017 both by teleconference and in person to discuss the topics in the second item. The CEWG began drafting a report in the fourth quarter of 2017 including all of the specified recommendations. Final recommendations will be finalized in 2018.

Mid-Cycle Working Group (MCWG): D.16-11-022 instructed the MCWG to reconvene and address the tasks outlined below. The MCWG was reconvened in February 2017. The members participating in the Working Group include representatives from the following organizations: CPUC Energy Division, CPUC Office of Ratepayer Advocates, SCE, PG&E, SoCalGas, SDG&E, Energy Efficiency Council, TELACU, and Proteus.

MCWG deliverables identified in D.16-11-022 were:

- Make recommendations for updates to the ESA Statewide Policy and Procedure Manual, California Installation Standards Manual, and monthly and annual reporting criteria to align it with D.16-11-022;
- Provide recommendations on the adoption of on-line data reporting systems (ODRS) for the ESA Program to help the IOUs and Commission better understand how these systems collect and report workforce data. This assessment should help determine the value of adopting ODRS for the ESA Program into IOU operations, its cost-benefits, and identify any administrative burdens to implement by either contractor or utility;
- Make recommendations for the household retreatment prioritization models, implementation and outreach strategies, and other aspects of the ESA Program;
- Investigate and make recommendations on how the ESA Program may be used to deploy tools to enable greater Energy Efficiency and Demand Response participation by CARE and ESA Program participants in recognition of the increased State goals detailed in SB 350.

The MCWG held several in-person meetings in 2017 (on April 26-27 and May 24-25) as well as multiple conference calls and webinars to address these tasks.

The MCWG discussed monthly and annual reporting criteria, and reviewed and commented on the reporting templates developed by Energy Division and the IOUs at a meeting on August 30, 2017. Comments were considered and incorporated into the templates for use beginning in 2018.

The working group completed revisions to the ESA Program Statewide Policy and Procedure Manual and the California Installation Standards Manual to align them with D.16-11-022 and D.17-12-009 (resolving Petitions for Modification of D.16-11-022 and revising D.16-11-022). The Manuals were submitted to the service list in A.14-11-007 et. al, and presented through a public webinar on January 31, 2018.

IOUs provided their household retreatment prioritization models to the MCWG in March 2017. These were reviewed and discussed by the MCWG for their initial recommendations, submitted on April 3, 2017.

The MCWG submitted its initial recommendations on April 3, 2017, with final recommendations to be submitted in the second quarter of 2018, in time to be considered in the IOUs' Mid-Cycle Advice Letter, which is due in July 2018 pursuant to D.17-12-009.

Multifamily Working Group (MFWG): The MFWG was established to support the integration of common area measures for deed restricted MF properties into the ESA Program and other MF directives as specified in D.16-11-022. The

MFWG developed a 2017 Annual Report describing the working group composition and structure, and detailing their 2017 activities (posted to www.energydataweb.com).

Highlights of the MFWG in 2017 include:

- Received MFWG members' input concerning multifamily program design suggestions;
- Compared the IOUs' initial program design review and discussion against a list of program design suggestions supplied by MFWG members; and
- Completed two property owners/operator discussions (i.e., large vs small/medium property owners/operators) to solicit program design feedback.

1.14 Annual Public ESA Program and CARE Meeting

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

In compliance with D.12-08-044, SoCalGas and the other IOUs held a public forum in San Francisco, California on June 22, 2017. There the IOUs presented an overview of their 2016 ESA and CARE Program results.

1.15 Multifamily Properties

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

SoCalGas' Multifamily Program Implementation Plan filing is scheduled for March 2018.

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

SoCalGas will explore coordination in 2018 as the Common Area Measure Initiative gets under way. Potential coordination efforts with the California Advanced Services Fund's Broadband Public Housing Account will also be discussed and considered by the MFWG in 2018.

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).²⁶ In PY2010, the legislature enacted Senate Bill (SB) 695 which changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE Program should be no greater than 200% of the FPG. In PY2006, the Commission authorized the utilities to implement: 1) CE which allowed customers to qualify for CARE based on their participation in certain state or federal public assistance programs; 2) four-year recertification for low-income customers with a fixed income; 3) a process to enroll certain prospective CARE qualified households by telephone; 4) a process to allow all customers to recertify their CARE eligibility through the IVR system; and 5) internet-based CARE enrollment and recertification.

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.

²⁶ See D.05-10-044

On November 18, 2014, SoCalGas filed its 2015 – 2017 program cycle application for approval of its Low-Income programs. While the decision was pending in the proceeding, program funding was bridged for the 2015 and 2016 program years. On November 22, 2016, D.16-11-022 was issued approving a budget for 2017 – 2020 and extending the program cycle to 2020. On March 14, 2017, the IOUs filed a Petition for Modification requesting clarification of the decision language and directives. D.16-11-022 also required the IOUs to file a conforming Advice Letter. SoCalGas filed its conforming Advice Letter 5111 on March 30, 2017. SoCalGas filed an update AL 5111-A on April 4, 2017. On April 10, 2017, the CPUC Energy Division suspended AL 5111-A and requested additional information. SoCalGas filed AL 5111-B on June 20, 2017. On August 8, 2017, the ED suspended this Advice Letter. On December 14, 2017 D.17-12-009 was issued resolving the Petitions for Modification for D.16-11-022.

This report provides information on SoCalGas' CARE Program accomplishments and expenditures for PY2017. At year-end of PY2017 the CARE Program had enrolled over 270,642 new customers and ended PY2017 with a penetration rate of 86%. Notable achievements of the CARE Program enhancements in 2017 include:

- Mailing of a 2nd PEV application to customers who fail to respond within 45 days to the initial request;
- Implementing a process to enable CSRs to directly enroll customers on to CARE beginning in February 2018;
- Implementation of the Mobile Home Park Utility Upgrade Program, seamlessly transferring CARE and MBL benefits to the tenants' new gas accounts;

- Updating My Account to allow CARE enrollment, recertification and post-enrollment verification via desktop or mobile devices;
- Enhancing the SoCalGas CARE website to process online applications in real-time;
- Upgrading CARE scanning operations to increase the efficiency and accuracy of application processing;
- Targeting 156,000 customers to receive the Home Energy Report;
- Initiating a plan to be implemented in the first quarter of 2018 for the delivery of CARE Rate Education Reports allowing customers to compare CARE vs. non-CARE energy rates;
- Initiated discussions on providing information to CARE customers on Lifeline services.

D.16-11-022 provides several directives related to My Account updates and mobile device/apps. SoCalGas updated its My Account with new CARE functions that is mobile device accessible and responsive. The My Account updates provide all non-CARE residential customers ability to be informed of the CARE Program and offered a facilitated enrollment process if they choose to apply. Additionally, CARE customers are informed of their CARE status, reminded/facilitated to recertify their CARE eligibility, reminded/facilitated to upload required proof of eligibility documentation if PEV is required.

SoCalGas continues the current marketing banner practice to target likely eligible customers based on internal analytics. Zip codes and penetration rates are used to identify enrollment gaps and specifically target potential new customers, those who need to recertify and those who need to re-enroll. SoCalGas leveraged its existing SoCalGas mobile app and embeded new CARE functionalities in lieu of creating a new CARE Program app. The SoCalGas mobile app intent is to

increase connections, which is critical in cross-promoting all company programs and services. CARE customers who use the mobile app would be exposed to other beneficial programs. SoCalGas' customers are able to apply for CARE and recertify their CARE eligibility in five different languages. All forms are accessible and responsive to mobile devices. In addition, linking the current CARE website to SoCalGas' mobile app landing page menu provides more exposure for the program.

SoCalGas continues to work towards meeting the CPUC directed CARE Program goals and objectives. Results for PY2017 are provided in the sections below.

2.1 Participant Information

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

CARE Residential Program Customers by Month		
Month/Year	Customers	% Change
Jan-17	1,566,972	-0.23%
Feb-17	1,561,944	-0.32%
Mar-17	1,560,389	-0.10%
Apr-17	1,567,144	0.43%
May-17	1,568,045	0.06%
Jun-17	1,565,776	-0.14%
Jul-17	1,560,691	-0.32%
Aug-17	1,557,155	-0.23%

Sep-17	1,556,511	-0.04%
Oct-17	1,557,184	0.04%
Nov-17	1,560,730	0.23%
Dec-17	1,564,126	0.22%

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

SoCalGas and the other IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly penetration estimates in PY2017. This method entails annual estimation of eligibility for CARE, the ESA Program, and other income-by-household size parameters at the small area (e.g., block group, census tract, and ZIP+2) for each IOU territory and for the state as a whole.

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

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

The requirements for 2017 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines [Federal Register /Vol. 82, No. 19 /Tuesday, January 31, 2017 /Notices; p.8832], “bundling” one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327.

Sources for the estimation include the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census 2010 SF3 data, Census American Community Survey 2011-2015 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match

the latest American Community Survey distributions at the Public Use Microdata Area.

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

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

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

The joint utility methodology, as described above, was used throughout PY2017.

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

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

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

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

geographic levels within a given utility area such as zip+2, zip, tract, county, and territory.

2.1.2.4 Describe how current CARE customers were counted.

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

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

The formula for calculating CARE-participation is:

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

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

SoCalGas is a single energy-source utility for natural gas. At year-end of PY2017, of SoCalGas' 1,819,451 CARE-eligible meters, 32.72% or 5,961,311 households were estimated to be eligible for the CARE discount.

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

At the end of PY2017, SoCalGas had 137,487 sub-metered tenants in 1,694 master-meter facilities. Assuming, by the methodology described above, 53.4% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 73,404 of its sub-metered tenants are CARE eligible.

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

As of year-end of PY2017, SoCalGas had 36,745 sub-metered tenants participating in the CARE Program.

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

SoCalGas estimates 50.06% of its CARE eligible sub-metered tenants were enrolled in the CARE Program as of the end of PY2017.

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

In PY2017, SoCalGas did not encounter any problems in administering the CARE Program for sub-metered and/or master-metered customers.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs

CARE Budget Categories	Authorized Budget¹	Actual Expenses	% of Budget Spent
Outreach	\$3,539,732	\$3,560,766	101%
Proc., Certification and Verification	\$2,509,631	\$1,076,903	43%
Post Enrollment Verification	\$148,382	\$122,862	83%
Information Tech./Programming	\$1,987,440	\$1,997,449	101%
CHANGES	\$437,502	\$485,007	111%
Measurement and Evaluation	\$0	\$0	0%
Regulatory Compliance	\$456,031	\$402,288	88%
General Administration	\$952,404	\$836,157	88%
CPUC ED Staff	\$60,000	\$49,359	82%
Cooling Centers	N/A	N/A	N/A
Total Expenses	\$10,091,122	\$8,530,791	84.54%
Subsidies and Benefits	\$131,338,535	\$107,960,958	82.20%
Total Program Costs and Discounts	\$141,429,657	\$116,491,749	82.37%

¹ Pursuant to D.16-11-022, the full year total budget has been updated to reflect Jan 2017 - Dec 2017. The Annual budget was approved in Resolution G-3532, D.16-11-022 and D.17-12-009.

2.2.2 Please provide the CARE Program penetration rate to date.

CARE Penetration Year-end 2017			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,564,126	1,819,451	86%	No

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

Month	Complaints Received	Nature of Complaint	Cases Resolved
February	1	The following message was received by the Customer Contact Center. "Customer requested that in the future, she would like to be notified that she will be getting terminated from CARE and will be getting rebilled if she does not submit her recertification by the certain date. I did advise customer that we sent out a recertification letter 11/9/16 to have her recertify. Customer is upset that on	Yes

		<p>her bill it doesn't explain to her why her account was rebilled and that she has to call-in to check. She was confused."</p> <p>Although the CSR used the term <i>recertification</i> in this description, it was actually a PEV complaint. The customer was called and informed that for the billing period 12/3/16 – 1/5/17, there was a bill message instructing the customer to mail in the verification application and documents proving eligibility, to avoid corrective billings.</p> <p>Customer understood.</p>	
June	1	<p>Customer stated that the recertification phone line (866) 716-3452 was malfunctioning and she was unable to process her recertification.</p> <p>Resolution: Customer was contacted and recertified by a CARE Representative.</p>	Yes
October	1	<p>Customer stated that she never received the CARE recertification form. The customer felt it was unfair that she was rebilled without the CARE discount. The customer stated that her mail was stolen, resulting in her not receiving the request nor the reminder letter. The customer requested to speak to a supervisor.</p> <p>Although the complaint was written as if pertaining to recertification, it was actually related to a PEV complaint. The CARE supervisor spoke to the customer regarding the complaint and informed the customer that on her July bill, a bill message regarding verification was displayed. The customer was reinstated on CARE, effective September 17, however, rebilling was not warranted, and the customer agreed.</p>	Yes

2.3 CARE Program Costs

2.3.1 Discount Cost

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

The average monthly discount received per SoCalGas' CARE customer in PY2017 was \$5.64²⁷ per month.²⁸

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

SoCalGas' CARE customers and expanded CARE customers (i.e., farm and migrant workers and those living in non-profit group living facilities or agricultural housing) received \$105,702,810 in natural gas rate discounts and \$2,258,148 in SEC discounts in PY2017.

The PY2017 annual subsidy for all SoCalGas CARE customers was \$107,960,958.

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

This section is not applicable to SoCalGas.

²⁷ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2017 by the monthly residential CARE customers: the total of the 12 months was then divided by 12 for the average monthly CARE discount per customer.

²⁸ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

2.3.2 Administrative Cost

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

See section 2.2 or CARE Table 1 in the attachments.

2.3.2.2 Explain what is included in each administrative cost category

Outreach: This category includes costs for the printing and mailing of CARE applications recertification requests, post enrollment verification requests, monthly sub-metered unit lists, and correspondence, the printing and mailing of SB 920 annual notification,²⁹ postage, bill inserts, brochures, flyers, advertising, direct mailing campaigns, telephone campaigns, web campaigns, third party outreach, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments and any agency-related outreach support efforts are also included in this category. Capitation payments are compensation fees paid to CBOs that assist SoCalGas in enrolling hard-to-reach CARE-eligible customers in the program.

²⁹ 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.

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

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

Information Technology (IT) Programming: This category includes IT labor and contractor costs to maintain the SoCalGas CARE application billing system, CARE IVR applications, CARE on-line applications, CARE functions in 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. Major system enhancements in 2017 included: 1) My

Account enhancements to allow customers to apply and recertify for the CARE discount and upload proof of eligibility when requested; 2) real-time approvals of on-line applications and recertifications; and 3) Customer Information System modification for SoCalGas Customer Contact Center (CCC) to enroll customers during turn-on and payment extension. The enhancements mentioned accounted for the high IT cost in 2017.

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

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates. There was no billing from PG&E in 2017 for this joint utilities study.

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

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

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

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

At year end of PY2017, the CARE balancing account was over-collected by \$24,825,093.

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

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

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

See CARE Table 10 in the attachments.

2.4 Outreach

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

In PY2017, SoCalGas continued to use both traditional communication and grassroots tactics to extend awareness and participation in the CARE Program. Traditional tactics include mass media advertising purchases, direct mail, email automated messaging, bill inserts, door-to-door canvassers, and participation in community outreach events. In addition to these traditional tactics, in PY2017, SoCalGas worked with CBOs to help with outreach of the CARE Program and promote awareness in order to increase enrollment with mainstream customers while continuing to expand awareness to hard-to-reach customers. These CBOs serve specialized markets and help SoCalGas enhance awareness of the CARE discount to communities. As an example, in PY2017, SoCalGas worked with the Native American Indian Commission. An information booth was at their annual Pow Wow event and Customer Assistance Program information was distributed. Additionally, sources were secured and meetings are scheduled for first quarter of 2018 with various tribal contacts to discuss further involvement and coordination.

Ethnic Media: Ethnic media plays a critical part in communicating with hard-to-reach customers. For Example, SoCalGas has an ongoing advertising contract with Radio Campesina (KMYX, Bakersfield & KUFW, Visalia) to increase awareness of Customer Assistance Programs,

especially among farmworkers and undocumented residents with limited English proficiency (LEP). These demographic customers can be less trusting of utilities or government sponsored programs due to the risk of exposure and are less likely to accept programs or services. By partnering with Radio Campesina, SoCalGas is able to reach these customers through a trusted community partner and in their language. The radio schedule consists of short, 30 second Spanish language ads that run several times a day.

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

Mass Media: SoCalGas kicked off the CARE and ESA Program Bridge Campaign during the month of July. Media tactics included radio, out of home, digital and print. The campaign began running on July 21 and ran through December 31. The tactics included TV vignettes, print, out-of-

home, radio, digital and social media. The goal of the media campaign was to increase awareness and drive enrollment participation of SoCalGas' Customer Assistance Programs. The digital campaign targeted customers based on socioeconomic demographics and psychographics that tracked customer behaviors. Additionally, SoCalGas ran these campaigns in the Los Angeles County, Orange County, San Bernardino County, Riverside County, Fresno, and Bakersfield areas.

Ethnic media included: TV stations Univision and Telemundo; radio stations KLove, Radio Campesina (campaign), KTNQ, KFWB La Mera Mera!, KJLH; Print media La Opinión, LA Watts Times, Eastern Group Publication, Excelsior, World Journal LA, Chinese LA Daily, Viet Bao, Korea Time LA, La Vida del Valle and Bakersfield News Observer; and Digital media Adsmovil. Approximately \$246,000 was invested in ethnic media during the campaign period.

Direct Mail: Direct mail continues to be a versatile and effective method for enrolling CARE customers. Generally, direct mail campaigns target customers with a probability of being eligible for Low-Income programs who meet the following criteria: CARE customers who have fallen off of the program and need to re-enroll, CARE customers who are nearing the end of the program term and need to recertify, new customers eligible for CARE, existing SoCalGas customers who are not on CARE and CARE

customers who have recently changed residence. As mentioned above, tools such as PRIZM codes are utilized to help identify these customers.

During PY2017, letters were also distributed to customers identified as needing to recertify for the CARE Program. These letters contained the heading “*Don’t Miss Out on Savings. Reapply to CARE today.*” The message conveyed within the letters was a sense of monetary loss intended to motivate customers to take advantage of the opportunity to recover benefits of the program by re-enrolling. The letters also displayed the dollar amount the customers could be saving by electing to continue participation in the program. For the customer’s convenience, income guidelines along with the application were also included in the mailing.

In PY2017, SoCalGas continued to conduct annual SB 920 targeted mailing (see Section 2.3.2.2. above) in its service territory to master-metered facilities with sub-metered customers in PY2017. SoCalGas continues to maintain compliance with AB 2104 by mailing out the monthly ‘Add & Delete’ report to notify owners/managers of sub-metered facilities about 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 PY2017, quarterly CARE bill messages were printed in both English and Spanish on non-participating customers' bills. Additionally, when applicable, CARE bill messages were sent out 45 days after the PEV letters were mailed to remind customers that SoCalGas had not received their verification application and proof of income. Further, if there was no response from the customer after 120 days, SoCalGas sent those customers a bill message informing them that they had been removed from the program.

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

Bill Inserts: Bill inserts continue to be a low-cost method to create program awareness and encourage enrollment. The inserts/applications are bilingual in English and Spanish and contain basic information. In June of 2017, SoCalGas sent out a bill insert to approximately 2.9 million residential customers. The bill insert announced the annual eligibility guidelines. In September of 2017, SoCalGas also sent out a bill insert to approximately 239,000 commercial customers. The latter bill insert described the CARE rate for commercial facilities such as non-profit group living and migrant farmworker housing.

Cross Program Promotion: Communication and outreach opportunities were sought out to cross-promote the CARE Program with other Customer Assistance Programs and EE programs to maximize customer value and reduce costs. Mass media and joint advertising campaigns incorporating both SoCalGas' ESA Program and CARE were conducted on a rolling basis. The ability to apply for CARE through SoCalGas' ESA Program applications made it easier for customers to obtain services and other SoCalGas assistance program information simultaneously. Customer information obtained from SoCalGas' ESA Program and GAF, along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes. Certain collateral materials used by SoCalGas' Outreach department and field operations personnel have been specifically designed to provide customers with information on all available low-income and special needs customer programs and services. Field Operations is instructed to leave customer assistance program information material in English and Spanish every time a customer's home is entered for services. SoCalGas employees that entered customer homes left approximately 500,000 flyers during PY2017.

SoCalGas.com Website: The SoCalGas website (www.socalgas.com) is a 24/7 communication and enrollment channel for the CARE Program. Monthly email blasts consisting of targeted electronic newsletters and emails promoting the CARE Program direct the customer to the

socalgas.com website. Customers can enroll in the CARE Program online using English and Spanish applications. In addition, customers who are already on the CARE Program and receive a reminder via email or letter to recertify their eligibility are directed to the website where they may recertify online. SoCalGas offers a total of five online applications in the following languages: English, Spanish, Chinese, Korean, and Vietnamese. SoCalGas also offers downloadable CARE applications in Large Font size for those with visual disabilities as well as in the following 13 languages: English, Spanish, Chinese, Korean, Vietnamese, Armenian, Arabic, Hmong, Farsi, Khmer, Russian, Tagalog, and Thai.

Customer Contact Center (CCC): Customers are informed by the IVR system about the CARE Program when they call to request a new service connection or payment arrangement. CSRs provide information regarding Customer Assistance Programs to facilitate enrollment of eligible customers. Customers can also request a CARE application from a CSR, the IVR, or from SoCalGas' website. Starting in 2018, CSRs will be able to enroll customers directly while they have the customer on the line.

Bilingual Employees: The CCC, CARE Customer Support Center, and most company business offices continued to be staffed with bilingual (English and Spanish) representatives. Vietnamese, Korean, Mandarin, and Cantonese telephone lines are staffed from 8:00 am to 5:00 pm,

Monday through Friday, at the CCC. Deaf and hearing impaired customers may also contact the CCC through its TTY/TDD equipment 24 hours a day, seven days a week. Additionally, SoCalGas' call center is equipped to provide services in 240 languages through the *Language Line Service*, a third-party interpreter service which is available 24 hours a day, seven days a week. For hearing impaired customers, a toll-free number is also provided.

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

Community Events: During PY2017, SoCalGas personnel participated in general and low-income specific community events. The goal of each event was to generate awareness of and increase participation in Customer Assistance Programs. SoCalGas has been striving to use events and event sponsorships to extend messaging with our communities and as opportunities to work with other organizations so that residents and customers get maximum value from attending. Key events in PY2017

included: 14th Annual Telemundo 52 Health Fair, 36th Annual Tet Festival, Abilities Expo, CicLAvia (San Pedro and Harbor City, Downtown LA and Boyle Heights), Southern California Edison Black History Month Celebration, City of Santa Ana's Cinco De Mayo Festival, Cinco de Mayo Festival in Pomona, Indio Senior Center Health and Wellness Fair, Arcadia Senior Expo, San Gabriel Valley Energy Wise Program, Frontier Foundation Annual Earth Day 2017, Older Adult Summit, LA County Department of Public Social Services (DPSS) Cal Fresh Training Course, Cambodian New Year Festival, Chinatown Service Center Health and Wellness Fair, Wheelchair Sports Festival, La Feria de los Ninos, Pasadena North - Golden Future 50 + Expo, West Los Angeles Veterans of Foreign Wars Hall Meeting, East Los Angeles Resource Center – Seminar to organization working with minorities with disabilities, Lancaster Jethawks and Grace Resource Center Christmas in July, LAX Disabilities Awareness, Senior Scam Prevention Event, Riverside City Annual Emergency Preparedness Fair; APIDC Walk-N-Roll, Fiesta Educativa Annual State Wide Multicultural Disability Conference, and Long Beach Veterans Affairs Blind Rehabilitation Center Open House and Wellness Event.

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

Community-Based Organizations (CBOs): In PY2017, SoCalGas

continued its grassroots outreach efforts. The primary driver has been to establish relationships with Faith-Based Organizations (FBOs) and CBOs in order to enroll hard-to-reach customers. Below are key partners from PY2017.³⁰

- **211 LA County:** Customer Assistance Programs and service information continue to be added to the growing California 211 information and referral network. 211 LA County provides social and support services to assist those in need which are mainly low-income residents. SoCalGas works very closely with 211 LA County so that the CARE Program is a key component of the operator's assessment of the caller's needs. During PY2017, SoCalGas continued working with these organizations, but also added several key partners to expand awareness.
- **Fiesta Educativa:** Fiesta Educativa is an organization that provides information and training to Latino families on how to obtain services for all persons with disabilities. In addition, training is provided to professionals who work with these families. Fiesta Educativa's efforts include an annual statewide conference providing more than 1,000 parents with information in English and Spanish on such topics as resources, patient and client rights, educational and vocational programs, and stress management for families, as well as the sponsorship of several regional conferences throughout the state. Fiesta Educativa has added SoCalGas Customer Assistance Programs into their topics of discussed at their training programs, resource centers and conferences.

³⁰ List of organizations in PY2017 include: 211 LA County, Abrazar, APIDC, Arc Foundation, Asian American Resource Center, Bienvenidos Community Health Center, Boys and Girls Club OC/Santa Ana, Breathe LA, California Council of the Blind, Casa 0101, Catholic Charities OC, Self Help for the Elderly, California State University Northridge, Disability Rights Advocates, Fiestiva Educativa, FIND, FOOD Share, Foundation of the Junior Blind, Grandma's House of Hope, Inner City Law Center, LA OIC, LA Prensa Hispana, LIFT, Little Saigon TV Network, LLS, LMG, MAOF, Mariachi Foundation, MICOP, North Valley Caring Services, OC 211, OCAPICA, Campensina Radio Network, RHF Bunker Hill Corporation, Disability Rights Advocates, Santa Barbara Food Bank and Senior Services, Second Harvest, Senior Serve, Service Center for Independent Life, Southern California Rehabilitation Services, Spanish Town Heritage Foundation, St Vincent's Meal, Unity Shoppe, UVSA, Via Care, Westside Center for Independent Living, Worksite Wellness.

Additional services include a home-based parent education and training program “Fiesta Familiar,” and an advocacy and outreach project assisting families and persons with disabilities to make the best use of the agencies and resources available to them in their communities.

- **Los Angeles Opportunity Industrialization Center:** SoCalGas also sponsored computer education events that are conducted by the Los Angeles Opportunity Industrialization Center. These computer intensive sessions provide computers and computer education for low-income residents in the City of Los Angeles at designated branches of the Los Angeles Public Library. CARE Program information is provided to all who attend.
- **St. Vincent Meals on Wheels:** SoCalGas worked with St. Vincent Meals on Wheels to provide CARE information to seniors who are homebound. Once a month, the organization includes CARE applications and/or general information with the daily meals.
- **Santa Barbara County Food Bank:** In order to expand awareness of Customer Assistance Programs in the underserved areas of Santa Barbara County, SoCalGas initiated its relationship with the Santa Barbara County Food Bank. The Santa Barbara County Food Bank conducts ongoing CalFresh outreach in the county. Because participation in CalFresh allows customer enrollment in the ESA Program and CARE through CE, SoCalGas began working with the Santa Barbara County Food Bank. This relationship is similar to the relationships with food banks in other counties such as described above.)
- **Unity Shoppe:** SoCalGas began working with Unity Shoppe, a CBO in Santa Barbara County. The organization serves low-income families, children, seniors, and persons with disabilities. Since each person served undergoes an assessment process by the organization, it is an opportunity to increase awareness of SoCalGas’ Customer Assistance Programs.

Capitation Contractors: SoCalGas worked with 38 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2017. These “CARE Capitation Contractors” are located throughout the SoCalGas service area and employ various types

of outreach strategies, such as local community event participation, walk-in enrollment, and program material distribution to enroll customers.

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

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

SoCalGas set a goal to reach 156,000 customers using the Home Energy Reports (HERs). The program expected to reach low-income customers to: 1) educate them on their gas usage; 2) inform them of energy saving tips; and 3) when applicable, encourage enrollment in the CARE Program. SoCalGas customers received two forms of marketing; 78,000 customers received Opower HERs outreach and received one paper form and 12 emails, and the other 78,000 customers received SoCalGas' developed HERs outreach and received four paper forms. At the end of the outreach campaign, a 20% attrition rate was observed. This is attributed to customers opting out from receiving the reports, or moved and/or closed accounts. 125,000 customers continue to receive the paper reports.

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

SoCalGas employed the following marketing and outreach tactics during PY2017: customer contact centers, direct mail, email, web based, third party outreach, bill inserts, and customer awareness efforts. Below is more detail on SoCalGas' largest sources of marketing based CARE enrollments.

Direct Mail: The largest source of enrollments for SoCalGas came from direct mail outreach which attributed to the processing of 40,844 applications. During PY2017, SoCalGas sent out approximately 1,622,860 direct mail pieces and received 73,231 direct mail applications resulting in 49,258 approved customers who were enrolled in the CARE Program.

SoCalGas' efforts to target and reach relatively large numbers of eligible customers not currently enrolled in the CARE Program are often accomplished through the direct mailing of CARE applications in which all of the letters and applications are in English and Spanish. These customers are selected based on an adjustable eligibility profile that shows them as living in high gap or high eligibility and low penetration areas. SoCalGas tracks direct mail by including a specific source code on the returned application that allows CARE Operations to track the enrollment source.

Web Based Outreach: In PY2017, SoCalGas received 67,284 applications through the internet and 43,646 were subsequently approved. All media communications directed customers to sign up for CARE through the website www.socalgas.com/care for English and www.socalgas.com/careparami for Spanish. Web based outreach consisted of program promotion through web links, e-mail blast campaigns, social media networks, and direct internet access. In addition,

the CARE Program page continues to be one of the most visited pages and one of the most “searched” keywords on the SoCalGas website, as digital and social media channels have become basic components of mass media awareness campaigns.

Technology continues to play a large role in awareness and outreach. Social media sites such as Facebook and Twitter generate “click-throughs” and along with email prompted web enrollment continue to be significant contributors to participation. SoCalGas acknowledged this trend and launched SoCalGas’ My Account applications and online web applications in the last quarter of 2017 generating over 33,000 applications submitted from launch through December 2017.

Third Party Door-to-Door Outreach: During PY2017, approximately 27,919 customers were enrolled by third party door-to-door outreach. Developed to perform outreach to SoCalGas’ hardest-to-reach low-income customers, this proactive door-to-door enrollment tactic continues to be a key component of SoCalGas’ marketing strategy. These outreach contractors produce high volume enrollments from a hands-on customer approach.

Bill Inserts: SoCalGas sent out over 2.9 million CARE self-mailer bill inserts during PY2017 with approximately 7,320 bill inserts and self-mailer

applications returned in PY2017, which resulted in approximately 3,926 customers enrolled into the CARE Program.

As discussed in section 2.4.1, SoCalGas sent out one residential bill insert in June of 2017. In September of 2017, SoCalGas also sent out a bill insert to 239,000 commercial customers. Bill inserts continue to be a cost effective, but declining channel for enrollments.

Customer Awareness: Mass media and grassroots partnerships maintain and enhance the awareness of the CARE Program for SoCalGas. Many forms of outreach and advertising may go into the decision a customer makes when requesting a CARE application from SoCalGas, which reinforces SoCalGas' use of awareness channels, such as mass media and outreach with CBOs. Even with direct mail, the reinforcement provided by other awareness channels may play an important role. Thus, SoCalGas tracks individual channels where possible, but also views various methods as inter-connected and mutually reinforcing. Below are examples of awareness channels that SoCalGas employed in PY2017.

- **Capitation Program:** As described in Section 2.4.1, SoCalGas worked with different CBOs and outreach agencies to enroll eligible nonparticipating customers in the CARE Program during PY2017. CARE capitation contractors are located throughout the SoCalGas service area and employ various types of outreach strategies to enroll customers, such as local community event participation, walk-in enrollment, and program material distribution.
- **Community-Based Organizations(CBO)/Faith-Based Organizations(FBO):** SoCalGas has been increasing its collaboration with CBOs and FBOs. These organizations are crucial

parts of our relationships 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. For example, some CBOs include Radio Campesina among farmworkers, Saint Barnabas Senior Services and St. Vincent Meals on Wheels among seniors, Catholic Charities of Orange County among CalFresh recipients in Orange County, and Fiesta Educativa for parents of children with disabilities.

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

As indicated by the LINA study, barriers to program participation were identified for the Hard-to-Reach population and included barriers for renters, language and literacy barriers, barriers for rural/farm workers, accessibility barriers, undocumented residents, and process related barriers. SoCalGas used this information along with information from a study amongst CARE-eligible household who did not respond to participation invitations to craft messaging and outreach materials. All efforts with messaging that drove our customers to web enrollment, such as direct mail - which continues to be the most effective forms of enrollment - continued to be utilized. However, the challenge, as identified in the LINA study of “literacy barriers” remains, and SoCalGas continues to fine-tune its targeting approach. The concern with literacy and other barriers as listed above are used to target customers. SoCalGas has noted this and has addressed ways to send out simplified communication materials. Literacy challenges and general hardship may contribute to customers who fail to respond to a request to recertify their eligibility. Timely recertification is another ongoing challenge for SoCalGas. During

PY2017, SoCalGas addressed this problem by sending reminder letters to customers and accompanying those letters with follow-up emails.

SoCalGas has continued this campaign throughout PY2017, while also continuing to test the effectiveness of several different “messages” including showing how much could have been saved through enrollment and or loss due to drop-off. Letters continue to be modified as needed, favoring the incorporation of infographics in comparison to text heavy letters in efforts to address the literacy issue.

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

SoCalGas is also working increasingly with its partners in the community to use existing computers as opportunities to guide customers in the enrollment process. Online sign ups played a key role in several outreach events and this approach is expected to continue and increase in the future.

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

As in past practice, customers who do not participate in SoCalGas' CARE Program, but are enrolled in other utilities' (e.g., an electricity provider) CARE Program, are automatically eligible for SoCalGas' CARE Program. To make sure that eligible customers in overlapping territories receive all discounts for which they are eligible, SoCalGas exchanges its CARE customer data with SCE and SDG&E. SoCalGas customers enrolled through data-sharing are mailed a letter notifying them of the enrollment, and are provided the opportunity to opt-out of SoCalGas' program if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in PY2001. In PY2017, SoCalGas enrolled 64,438 SCE CARE customers into the CARE Program. Customers not enrolled were either already participating in SoCalGas' CARE Program or were not SoCalGas customers.

During PY2017, SoCalGas conducted a data exchange with SDG&E in October. The exchanges resulted in 727 SDG&E CARE participants being added to SoCalGas' CARE Program.

Joint Utility Program Manager's Meeting:

In PY2017, SoCalGas, SCE, PG&E, SDG&E, Southwest Gas and Sacramento Municipal Utility District continued to meet periodically to discuss CARE outreach efforts and program operation issues, resolutions, and enhancements. The IOUs met on March 14, 2017 at PG&E in San Francisco, July 25, 2017 at SoCalGas' Company Tower in Los Angeles and October 27, 2017 at Southwest Gas in Las Vegas, Nevada.

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

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

In PY2017, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who are receiving benefits from the ESA Program are automatically enrolled for the CARE discount and exempt from PEV if their eligibility has been verified by the ESA Program. In PY2017, SoCalGas enrolled 21,168 ESA Program customers in CARE.

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

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

Through leveraging efforts with SoCalGas' GAF Program, SoCalGas enrolled 591 new participants in its CARE program during PY2017.

In PY2017, the GAF program provided approximately \$238,156 in customer assistance. Funds for the program came from donations from customers, employees and shareholders.

PY2017	Shareholder Funded Distribution	Ratepayer Funded distribution	Total YTD
Beginning Balance	\$8,943	\$0 ¹	\$8,943
Customer & Shareholder Contributions	\$308,504	\$0	\$308,504
Total Funds Available	\$282,703	\$0	\$282,703
Administrative Fees ¹	\$25,801	\$0	\$25,801
GAF Payments	\$238,156	\$0	\$238,156
Remaining Balance	\$44,546	\$0	\$44,546
Customers Assisted			2,609
Average Assistance			\$91

¹ There were no Ratepayer Funds used in PY2017.

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 events. Outreach representatives are able to discuss multiple ways to save on energy bills such as the CARE discount, and weatherization, and/or repairs for residences. In addition, SoCalGas often coordinates with SCE at events. Even though located in separate booths, the two utilities are positioned close to each other and the customer is able to focus on “utility bill” assistance. Outreach workers are able to assist in directing customers to each booth. The outreach events at the Westside Center for Independent Living were an example of this approach.

Additionally, CARE Outreach also collaborates extensively with CalFresh program outreach. Outreach efforts taken to reach and coordinate the CARE Program to eligible customers, occur at events such as FBO workshops (e.g., Catholic Charities in Orange County) and with food banks (e.g., FIND Food bank which services Imperial and Riverside Counties).

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

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

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

In May 2000, CSD and SoCalGas entered into an agreement that solidified the coordination of resources and program benefits between CSD's LIHEAP and SoCalGas' CARE and GAF Programs. In June 2000, SoCalGas added the toll-free telephone numbers for LIHEAP (and the ESA Program) on the CARE applications. At the same time, SoCalGas began providing CSD's toll free number to customers who call SoCalGas to request information on low-income assistance programs.

For PY2017, SoCalGas did not receive low-income customer information or requests for the CARE discount information from CSD. However, SoCalGas continued to receive LIHEAP payment information from CSD, which was used to apply LIHEAP payment assistance to a low-income customer's bill. For LIHEAP recipients, SoCalGas has an automated process in place that automatically PEV approves an account once a LIHEAP payment is posted to the account. Similarly, regarding GAF, once a GAF pledge is placed on an account, the customer is automatically PEV approved for CARE.

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

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

SoCalGas processed nearly 304,000 mailed applications (system generated, direct mail, bill inserts) in PY2017 via their content management systems, with two percent of those requiring manual data entry. 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 accordingly. In PY2017, SoCalGas approved 45,223 customer applications from its website with very minimum labor resources. SoCalGas will actively promote and support CARE enrollment and recertification through the SoCalGas website.

SoCalGas continues to utilize best practices to maximize excellent customer service, to ensure ease of enrollment, CARE approval, recertification, and PEV. Designed to increase enrollment and aid in the retention of CARE customers, included are web enrollment, IVR enrollment, mail, fax or email an application, outbound dial reminder calls,

leveraging with internal and external low-income programs, approval of CARE on accounts pending turn-on, and mailing of a 2nd recertification 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 within a few days. The 2nd recertification application is mailed to customers who fail to respond within 45 days to the initial request.

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

Major changes to the CARE program in 2017 include mailing of a 2nd PEV application, CSR CARE enrollments, the Mobile Home Park Utility Upgrade Program, My Account CARE implementation, SoCalGas CARE website enhancement, and CARE scanning operations upgrade.

Mail 2nd PEV Application: Non-responsive customers are terminated from the CARE Program. Customers who wish to become re-enrolled

must submit proof of income or proof of participation in a specific assistance program when their termination date is less than 24 months from the current date. After 24 months from PEV termination have lapsed, customers can get back on the program by simply completing a self-cert application.

In its PY2015-2017 Application, SoCalGas proposed automatic mailing a 2nd PEV application to customers who have not responded within 45 days to their first verification request. Although originally slated for implementation in PY2015, the 2nd notice was put on hold awaiting the CPUC's final decision.

Plans were resumed after D.16-11-022 was issued on November of 2016 and the mailing of a 2nd PEV application was implemented in February of 2017.

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

and used specifically by the CCC. Thorough testing and training of the CSRs took place during the fourth quarter of 2017. Implementation is scheduled for February 2018.

Mobile Home Park Utility Upgrade Program (MHP UUP): Almost 200 mobile home parks have converted from master-metered or submetered to direct utility, impacting more than 11,000 tenants. For tenants on CARE and MBL, these programs have been seamlessly transferred to the tenants' new gas accounts for continued access to the benefit of each program. As the MHP UUP account executives hold meetings at the respective parks to provide an overview of the conversion, the account executives have continued to enroll additional tenants into CARE. Also, of added benefit of the MHP UUP has been the conversion of master-metered accounts, where due to the meter configuration, tenants did not qualify for CARE. Once converted as SoCalGas customers, these tenants are now able to apply for CARE.

My Account: Implemented in September of 2017 based on D.17-12-009, CARE Program enrollment is now being promoted on My Account. Application processes including enrollment, recertification and PEV have been made available to English and Spanish speaking My Account users. CARE customers also have the option to opt-out of the program if they no longer qualify. Once customers log into My Account, their message center alerts them that they can apply to the CARE Program to see if they qualify,

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

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

images linked to the ESA Program page are included in the CARE enrollment approval confirmation message and emails.

In PY2017, SoCalGas approved a total of 30,099 applications received through My Account from September to December.

SoCalGas.com: In December of 2017, an enhancement to the SoCalGas CARE website was implemented in which online applications are now processed in real-time, instead of the previous overnight batch process. Additionally, all five languages' "Apply Now" links navigate to a dedicated CARE page outside of My Account in the respective languages. From there, the customer can enter their account number and zip code, or look up their account number using their social security number. The customer will then be taken to the same My Account CARE page without having to log into My Account, and be able to enroll, recertify or opt-out of CARE. In order to submit PEV, the customer needs to log into My Account. Mobile versioning of the SoCalGas CARE website has also been made available.

Upon implementation in mid-December, SoCalGas approved 1,927 web applications within that month. This enhancement has improved customer service and sped up enrollments by providing instant application confirmation.

Scanning Operations: Application scanning and processing operations were performed smoothly without interruption in PY2017. Enhancements to the scanning system were implemented in 2017 to increase the efficiency and accuracy of application processing. Such enhancements included the scanning machine being upgraded to a newer model after ten years, upgrading the system software to the newest version, creating new and improved data recognition templates, and consolidating older templates. Thorough testing of the improved system and training for the CARE Operations group were conducted before implementation. In addition to these enhancements, an automated email notification providing a daily report of scanned applications to be processed was implemented for the CARE Operations group to efficiently handle the batches and stay in compliance.

2.5 Processing CARE Applications

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

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

the CPUC in D.06-12-038,³¹ SoCalGas implemented a four year recertification period for customers receiving Social Security, pension, Supplemental Security Income, Social Security Disability, State Supplemental Program, and/or Medi-Cal benefits.

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

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

Applications received via U.S. mail are opened, scanned, and validated for processing efficiency. Tenants are allowed 90 days to respond to the

³¹ See D.06-12-038.

recertification request, however, for tenants who have not responded to the recertification request within 45 days of the initial mailing, a second recertification is sent. Non-responsive tenants are terminated from CARE. If the recertification is received and approved after the 90 day time-frame, the tenant is re-enrolled in CARE.

Ongoing efforts include the annual mailing of a complete listing of its CARE tenants to each sub-metered facility. Additionally, 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 terminated from the program. This ensures proper recordkeeping and appropriate billing of the 20% discount for each CARE tenant.

Although it is the responsibility of the owners/managers to maintain their own listing of CARE tenants, SoCalGas made the decision to aid in their recordkeeping by providing monthly listings rather than only the annual one. In 2017, CARE and IT departments created, and tested for accuracy, automation of a monthly CARE listing, slated for implementation February 2018. As a courtesy, a notification letter was mailed to the mobile home parks informing them of the upcoming monthly listing of their CARE tenants, which will be mailed in addition to the monthly Add & Delete report, and will coincide with the mailing of the monthly bill.

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

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

In PY2017, SoCalGas contracted with 38 CBOs and two third party outreach contractors to help eligible non-participating customers sign up for the CARE Program. The non-profit CARE Capitation CBOs employed a "one-stop-shop" approach by helping their clients complete a CARE application, while also assisting the customers in enrolling in other programs they might be eligible for.

SoCalGas' third party CARE Outreach contractors employed a variety of outreach strategies, such as door-to-door solicitation, local community event participation, and program material distribution to help customers apply for CARE. Many of the customers targeted by the third party CARE

contractors do not respond to traditional forms of outreach, do not visit CBO facilities, and are much more receptive to door-to-door canvassing efforts. In PY2017, SoCalGas assigned specific counties to the third party outreach contractors so they could focus on their specific assigned SoCalGas territories and provide better customer service.

During PY2017, the number of customers enrolled in CARE by SoCalGas' CARE Capitation CBOs was 11 customers, and 27,919 new enrollments were derived from CARE's third party canvassers' efforts.

2.6 Program Management

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

SoCalGas' CARE Program did not experience any serious issues or events that significantly affected program management during PY2017.

2.7 Pilots

2.7.1 Establishment of CHANGES Program

In D.15-12-047,³² the Commission approved the establishment of CHANGES as an ongoing statewide program, effective January 1, 2016. This was based on the success of the CHANGES pilot during its four year trial, and demonstrated to the CPUC the need for and usefulness of the

³² D.15-12-047 (CHANGES Decision)

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

CHANGES is funded from CARE Program contributions by customers of the IOUs and provides services in those areas, not to exceed \$1.75 million per fiscal year. Until a long term CPUC funding source can be established, the CHANGES Program will continue to be funded as a reimbursement from the CARE Program through the end of the current 2017-2020 program cycle and may be renewed by the Commission as needed into the next CARE Program cycle. This is consistent with Public Utilities Code section 739.4, which allows expenditure of CARE funds to protect low-income and senior households from unwarranted disconnection of necessary electric and gas services.

In PY2017, meetings were scheduled by CSID, in collaboration with ED, and held on a quarterly basis with all IOUs to discuss changes in the IOUs' program services, new consumer materials, marketing leveraging opportunities, and updates on statewide CHANGES program activities.

PG&E, SDG&E, SCE and SoCalGas received monthly data in PY2017 and included this data in monthly reports due on the 21st of each month.

SoCalGas also included CHANGES bill issue assistance and education workshop materials and attendance statistics on a quarterly basis when available in their monthly CARE reports (Low Income Programs Monthly tables 10 and 11). The year-to-date total through December 2017 for One-on-One assistance was 364 customers with 264 calls to the dedicated 800 line. The CHANGES group assistance sessions totaled 879 with 11,497 attendees.

2.8 Studies

No studies were conducted in PY2017.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

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

See CARE Table 12 in the attachments.

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

There were 19,514 residents in the non-residential CARE Expansion Program facilities, comprised of 576 primary facilities with 499 associated

satellite facilities participating in the CARE Expansion Program at PY2017 year-end.

3.2 Usage Information

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

See CARE Table 12 in the attachments.

3.3 Program Costs

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

For PY2017, SoCalGas incurred \$2,769 in outreach expenses for the CARE Expansion Program bill insert to 240,000 commercial customers. Because of the small number of participants, SoCalGas did not track administrative labor costs for new CARE Expansion applications received during PY2017.

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 PY2017 was \$71.03.³³

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

3.3.2.2 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 PY2017 was \$354.36.³⁴

3.4 Outreach

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

Annually, SoCalGas sends a bill insert to commercial customers informing them of the Non-Profit Group Living Rate. In addition, SoCalGas worked with Public Affairs personnel in rural counties to promote program awareness for low-income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Radio Campesina in Visalia and Bakersfield to reach farm workers. During PY2017, Radio Campesina provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Food, musical entertainment, and information from SoCalGas regarding the CARE Program are part of these lunch break sessions. In PY2017, SoCalGas also advertised the CARE Program with 30 second, Spanish language radio spots and participated in community events and local school events. SoCalGas also partnered with the station for holiday giveaways to families in the surrounding areas that receive all items needed for a holiday meal.

³⁴ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

3.4.2 Discuss each of the following: The Expansion Program outreach

SoCalGas used a variety of channels to increase awareness of the CARE Program in PY2017. Among those channels were agricultural workers and those living in commercial facilities. During September of 2017, SoCalGas mailed approximately 240,000 bill inserts to commercial facilities (non-profit group living facilities and migrant worker housing). In past years, SoCalGas also leveraged the relationships of its Public Affairs personnel in developing grassroots relationships with organizations such as Radio Campesina and Mixteco that work closely with agricultural and migrant workers in order to continue to educate members about SoCalGas' Customer Assistance Programs.

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

In PY2017, the CCC continued to be an effective outreach method for SoCalGas' CARE Expansion Program's non-residential facilities. In this model, customers that call in to make payment arrangements, have their service established, or request service activation talk with the CSRs who present the CARE Program to them and respond to questions. Social service networks also continue to be another valuable communication medium to promote CARE Program information to CARE expansion customers.

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

There was no facility data sharing during PY2017.

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

SoCalGas is not aware of barriers to participation in PY2017. A knowledgeable, full-time SoCalGas employee, dedicated solely to the Expansion Program, processes applications as they are received. Incomplete applications are followed-up with a phone call or correspondence to the customer, resulting in CARE approval of qualified accounts.

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

SoCalGas considers the current processing of CARE Expansion Program applications to be cost-effective. The application is easy to understand and the majority of applicants include the necessary qualifying documentation with no further follow-up needed. Applications are processed in a timely manner when they are received.

Occasionally, a follow-up phone call is necessary. SoCalGas recertifies the accounts every two years. Correspondence containing a recertification application, postage-paid envelope, and an instruction letter is mailed to the facilities. Among other directions, the letter states that the facility must include a short statement specifying how the CARE Program savings were used for the benefit of the residents at the facility. The facilities are familiar with this routine and submit what is requested.

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

3.5 Program Management

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

SoCalGas' CARE Program did not experience any issues or events that significantly affected program management during PY2017.

4. FUND SHIFTING

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

See ESA Table 12.

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

See CARE Table 1.

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

All fund shifting activity performed in PY2017 is in compliance with fund shifting rules as laid out in D.12-08-044 and D.16-11-022.

5. COMMONLY USED ACRONYMS

3MM	Three Measure Minimum Rule
AB	Assembly Bill
AL	Advice Letter
CARE	California Alternate Rates for Energy
CBO	Community Based Organizations
CE	Categorical Eligibility
CHANGES	Community Help and Awareness with Natural Gas and Electricity Services Pilot Program
CSR	Customer Service Representative
CPUC	California Public Utilities Commission
CCC	Customer Contact Center
CSD	California Department of Community Services and Development
CSID	Consumer Service and Information Division
D.	Decision
E&A	Enrollment & Assessment
ED	Energy Division
ESA	Energy Savings Assistance Program
FAU	Force Air Unit
FBO	Faith Based Organizations
EE	Energy Efficiency
FPL	Federal Poverty Level
FPG	Federal Poverty Guidelines
GAF	Gas Assistance Fund
HEAT	Home Energy Assistance Tracking
HE	High efficiency
HER	Home Energy Report
IDSM	Integrated Demand Side Management
IT	Information Technology
IVR	Integrated Voice Recognition
IOU	Investor Owned Utilities
LADWP	Los Angeles Department of Water and Power

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

6. APPENDIX A: COLLATERAL MATERIALS

6.1 ESA Program Tables

ESA Program- Table 1 - Overall Program Expenses

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

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

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

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

ESA Program- Table 3 - Cost Effectiveness

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

ESA Program- Table 5 - Direct Purchases & Installation Contractors

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

ESA Program- Table 7 - Expenditures Recorded by Cost Elements

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

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

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

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

ESA Program- Table 12 - Fund Shifting

ESA Program- Table 13 - Categorical and Other Enrollment

ESA Program- Table 14 - Leveraging & Integration

ESA Program- Table 15 - Lighting

ESA Program- Table 16 - "Add back" measures

ESA Program – Table 17 -Expenditures for Pilots and Studies

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

6.2 CARE Tables

CARE Table 1 - Overall Program Expenses

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

CARE Table 3 - Verification

CARE Table 4 - Self Certification and Re-Certification

CARE Table 5 - Enrollment by County

CARE Table 6 - Recertification Results

CARE Table 7 - Capitation Contractors

CARE Table 8 - Participants as of Month End

CARE Table 9 - Average Monthly Usage & Bill

CARE Table 10 - Surcharge & Revenue

CARE Table 11 - Capitation Applications

CARE Table 12 - Expansion Program

CARE Table 13 - High Usage Verification Results

CARE Table 13A – Customer Usage and ESA Program Treatment

CARE Table 14 – Categorical Enrollment

**Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
SOUTHERN CALIFORNIA GAS COMPANY
PY 2017 Summary Highlights**

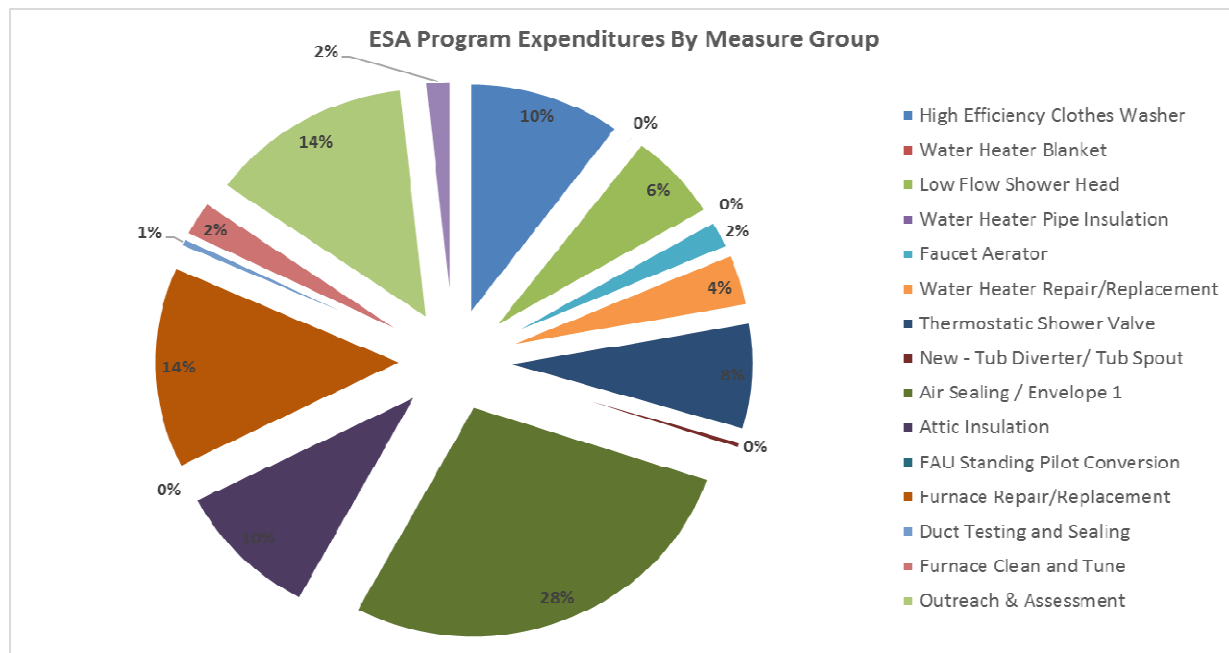
ESA Program

2017 Energy Savings Assistance Program Summary			
2017	Authorized / Planning Assumptions	Actual	%
Budget	\$133,369,265	\$79,364,204	60%
Funded from 2009-2016 Unspent Funds	\$86,474,277	\$17,520	0%
Summary Homes Treated	110,000	93,790	85%
Summary kWh Saved	N/A	N/A	N/A
Summary kW Demand Reduced	N/A	N/A	N/A
Summary Therms Saved	4,670,503	1,552,610	33%
First Touches Homes Treated	82,500	35,366	43%
- kWh Saved	N/A	N/A	N/A
- kW Demand Reduced	N/A	N/A	N/A
- Therms Saved	3,502,877	607,583	17%
Go-Backs/Retreated Homes	27,500	58,424	212%
- kWh Saved	N/A	N/A	N/A
- kW Demand Reduced	N/A	N/A	N/A
- Therms Saved	1,167,626	947,027	81%

Note: The authorized budget and values shown for planning assumptions are from SoCalGas' Conforming Advice Letter 5111-A filed on April 4, 2017 and authorized by Commission Resolution G-3532 dated December 14, 2017.

CARE Program

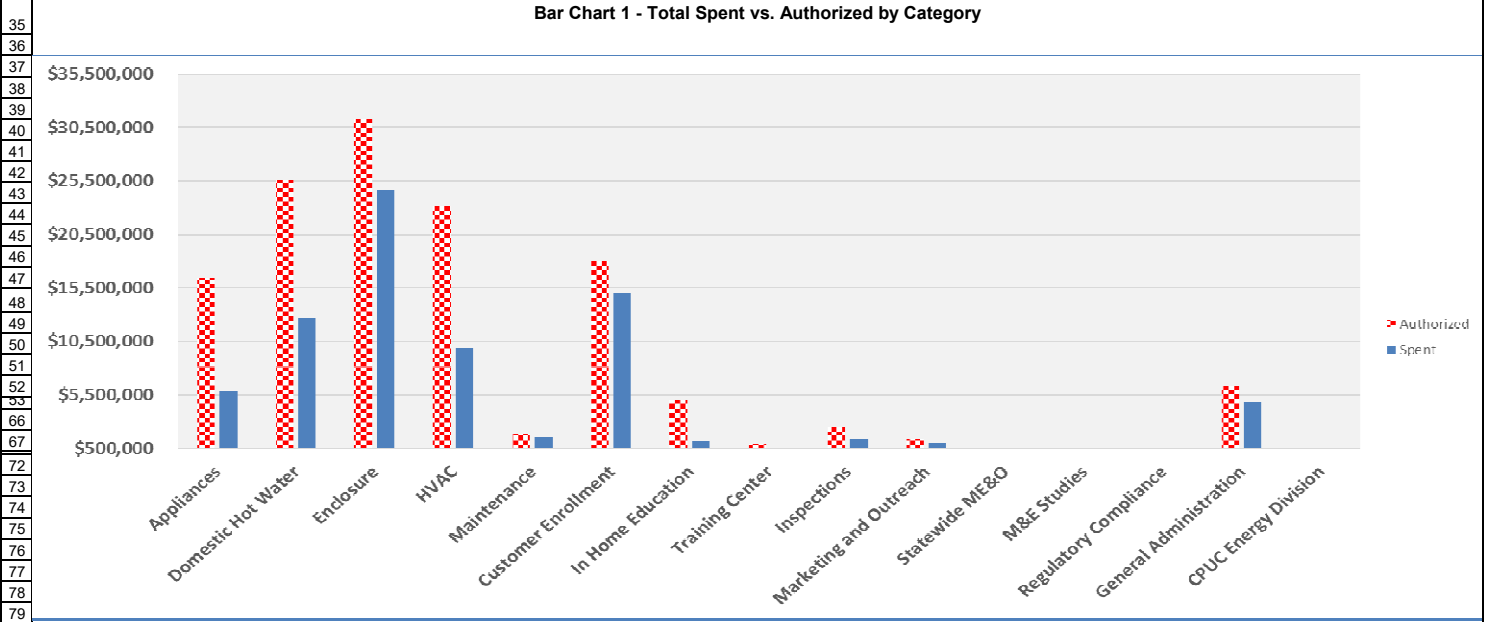
2017 CARE Program Summary			
2017	Authorized Budget	Actual	%
Administrative Expenses	\$ 10,091,122	\$ 8,530,791	85%
Subsidies	\$ 128,608,105	\$ 105,702,810	82%
Service Establishment Charge	\$ 2,730,430	\$ 2,258,148	83%
Total Program Costs and Discounts	\$ 141,429,657	\$ 116,491,749	82%
2017 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	88,328	124,156	58,158
2017 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	1,819,451	1,564,126	86%



	A	B	C	D	E	F	G	H	I	J
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 1 ESA Program Overall Program Expenses SOUTHERN CALIFORNIA GAS COMPANY									
2		2017 Authorized Budget ¹			2017 Annual Expenses			% of Budget Spent		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances	N/A	\$ 16,450,664	\$ 16,450,664	N/A	\$ 5,896,013	\$ 5,896,013	N/A	36%	36%
6	Domestic Hot Water	N/A	\$ 25,541,417	\$ 25,541,417	N/A	\$ 12,726,839	\$ 12,726,839	N/A	50%	50%
7	Enclosure	N/A	\$ 31,356,733	\$ 31,356,733	N/A	\$ 24,670,314	\$ 24,670,314	N/A	79%	79%
8	HVAC	N/A	\$ 23,190,540	\$ 23,190,540	N/A	\$ 9,853,571	\$ 9,853,571	N/A	42%	42%
9	Maintenance	N/A	\$ 1,922,439	\$ 1,922,439	N/A	\$ 1,562,231	\$ 1,562,231	N/A	81%	81%
10	Lighting	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
11	Miscellaneous	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
12	Customer Enrollment	N/A	\$ 17,994,860	\$ 17,994,860	N/A	\$ 14,944,679	\$ 14,944,679	N/A	83%	83%
13	In Home Education	N/A	\$ 5,021,521	\$ 5,021,521	N/A	\$ 1,205,454	\$ 1,205,454	N/A	24%	24%
14	Pilot	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
15	Energy Efficiency TOTAL	N/A	\$ 121,478,173	\$ 121,478,173	N/A	\$ 70,859,101	\$ 70,859,101	N/A	58%	58%
16										
17	Training Center	N/A	\$ 901,998	\$ 901,998	N/A	\$ 618,329	\$ 618,329	N/A	69%	69%
18	Inspections	N/A	\$ 2,509,088	\$ 2,509,088	N/A	\$ 1,452,338	\$ 1,452,338	N/A	58%	58%
19	Marketing and Outreach	N/A	\$ 1,450,000	\$ 1,450,000	N/A	\$ 991,272	\$ 991,272	N/A	68%	68%
20	Statewide Marketing Education and Outreach	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
21	Measurement and Evaluation Studies ²	N/A	\$ 115,625	\$ 115,625	N/A	\$ 192,970	\$ 192,970	N/A	167%	167%
22	Regulatory Compliance	N/A	\$ 471,807	\$ 471,807	N/A	\$ 307,039	\$ 307,039	N/A	65%	65%
23	General Administration	N/A	\$ 6,356,574	\$ 6,356,574	N/A	\$ 4,890,804	\$ 4,890,804	N/A	77%	77%
24	CPUC Energy Division	N/A	\$ 86,000	\$ 86,000	N/A	\$ 52,352	\$ 52,352	N/A	61%	61%
25										
26	TOTAL PROGRAM COSTS	N/A	\$ 133,369,265	\$ 133,369,265	N/A	\$ 79,364,204	\$ 79,364,204	N/A	60%	60%
27		Funded Outside of ESA Program Budget								
28	Indirect Costs					\$ 2,624,550	\$ 2,624,550			
29	NGAT Costs				\$ -	\$ 2,071,063	\$ 2,071,063			
30										

¹ Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution G-3532 dated December 14, 2017 which addressed SoCalGas' Conforming Advice Letter 5111-A filed on April 4, 2017. Budget does not reflect \$4.5M for Multi-Family or \$261K for CSD also approved in Resolution G-3532 for a total approved budget of \$138,130,301.

² Measurement and Evaluation studies authorized 2017 - 2020 budget is \$500K. See ESA Table 12.



PY 2017 Energy Savings Assistance Program Annual Report
ESA Program Table 1A
Expenses Funded from 2009-2016 Unspent Program Funds
SOUTHERN CALIFORNIA GAS COMPANY

	2017-2020 Authorized Budget ^{1, 2}			2017 Annual Expenses			% of Budget Spent		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
Appliances	N/A	\$ 4,251,507	\$ 4,251,507	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Domestic Hot Water	N/A	\$ 32,202,646	\$ 32,202,646	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Enclosure	N/A	\$ 9,123,929	\$ 9,123,929	N/A	\$ -	\$ -	N/A	0.00%	0.00%
HVAC	N/A	\$ 8,584,066	\$ 8,584,066	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Maintenance	N/A	\$ 749,539	\$ 749,539	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Customer Enrollment	N/A	\$ 5,480,503	\$ 5,480,503	N/A	\$ -	\$ -	N/A	0.00%	0.00%
In Home Education	N/A	\$ 6,218,260	\$ 6,218,260	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Training Center	N/A	\$ 92,337	\$ 92,337	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Inspections	N/A	\$ 916,590	\$ 916,590	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Mult-Family	N/A	\$ 18,000,000	\$ 18,000,000	N/A	\$ 17,520	\$ 17,520	N/A	0.10%	0.10%
Leveraging - CSD	N/A	\$ 522,072	\$ 522,072	N/A	\$ -	\$ -	N/A	0.00%	0.00%
Regulatory Compliance	N/A	\$ 332,828	\$ 332,828	N/A	\$ -	\$ -	N/A	0.00%	0.00%
TOTAL UNSPENT PROGRAM COSTS ¹	N/A	\$ 86,474,277	\$ 86,474,277	N/A	\$ 17,520	\$ 17,520	N/A	0.02%	0.02%

¹ D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds.

² Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution G-3532 dated December 14, 2017.

PY 2017 Energy Savings Assistance Program Annual Report
ESA Program Table 2
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

	ESA Program (Summary) Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) ⁶						
		Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation					
Measures	Units	Quantity Installed	kWh ¹ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditure	Units	Quantity Installed	kWh ¹ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditure	Units	Quantity Installed	kWh ⁴ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditure	Units	Quantity Installed	kWh ⁴ (Annual)	kW ⁴ (Annual)	Therms ⁴ (Annual)	Expenses (\$)	% of Expenditure
Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																						
High Efficiency Clothes Washer	Each	7,928	-	-	244,817	\$ 6,285,563	9.1%	Each	3,155	-	-	97,426	\$ 2,501,183	9.4%	Each	4,773			147,390	3,784,380	9.0%	Each	4,087	-	-	126,207	\$ 3,240,458	9.5%
Refrigerators	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%
Microwaves ⁵	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water																												
Water Heater Blanket	Home	2,046	-	-	4,939	\$ 117,008	0.2%	Home	1,150	-	-	2,781	\$ 65,680	0.2%	Home	896	-	-	2,158	\$ 51,328	0.1%	Home	734	-	-	1,799	\$ 41,967	0.1%
Low Flow Shower Head	Home	87,444	-	-	126,461	\$ 3,869,571	5.6%	Home	32,750	-	-	46,550	\$ 1,490,445	5.6%	Home	54,694	-	-	79,911	\$ 2,379,126	5.6%	Home	49,652	-	-	68,163	\$ 1,942,769	5.7%
Water Heater Pipe Insulation	Home	2,039	-	-	3,616	\$ 45,142	0.1%	Home	926	-	-	1,663	\$ 20,470	0.1%	Home	1,113	-	-	1,954	\$ 24,672	0.1%	Home	818	-	-	1,506	\$ 18,101	0.1%
Faucet Aerator	Home	83,890	-	-	276,193	\$ 1,213,797	1.8%	Home	31,102	-	-	100,007	\$ 464,426	1.7%	Home	52,788	-	-	176,186	\$ 749,371	1.8%	Home	47,992	-	-	148,134	\$ 653,481	1.9%
Water Heater Repair/Replacement	Each	1,529	-	-	5,333	\$ 2,287,521	3.3%	Each	602	-	-	2,087	\$ 872,720	3.3%	Each	927	-	-	3,245	\$ 1,414,802	3.3%	Each	544	-	-	1,880	\$ 784,749	2.3%
Thermostatic Shower Valve	Each	105,503	-	-	247,141	\$ 4,688,081	6.8%	Each	39,903	-	-	91,995	\$ 1,771,414	6.6%	Each	65,600	-	-	155,147	\$ 2,916,667	6.9%	Each	54,380	-	-	118,643	\$ 2,414,986	7.1%
New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	2,776	-	-	22,545	\$ 294,489	0.4%	Each	911	-	-	7,434	\$ 96,881	0.4%	Each	1,865	-	-	15,111	\$ 197,608	0.5%	Each	1,046	-	-	8,834	\$ 110,756	0.3%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Enclosure																												
Air Sealing / Envelope ¹	Home	73,802	-	-	277,396	\$ 17,317,536	25.1%	Home	26,052	-	-	109,705	\$ 6,104,277	22.9%	Home	47,750	-	-	167,692	\$ 11,213,259	26.5%	Home	40,660	-	-	36,382	\$ 9,323,066	27.3%
Caulking	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	4,795	-	-	128,904	\$ 6,055,503	8.8%	Home	2,311	-	-	61,976	\$ 3,108,660	11.6%	Home	2,484	-	-	66,928	\$ 2,946,842	7.0%	Home	3,151	-	-	87,746	\$ 3,646,896	10.7%
HVAC																												
FAU Standing Pilot Conversion	Each	13	-	-	546	\$ 4,228	0.0%	Each	4	-	-	168	\$ 1,322	0.0%	Each	9	-	-	378	\$ 2,906	0.0%	Each	6	-	-	252	\$ 1,972	0.0%
Furnace Repair/Replacement	Each	6,678	-	-	-	\$ 8,867,733	12.9%	Each	2,180	-	-	-	\$ 3,284,113	12.3%	Each	4,498	-	-	-	\$ 5,583,620	13.2%	Each	4,022	-	-	-	\$ 5,641,149	16.5%
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	1,273	-	-	19,446	\$ 365,568	0.5%	Home	577	-	-	8,820	\$ 167,321	0.6%	Home	696	-	-	10,625	\$ 198,247	0.5%	Home	534	-	-	8,142	\$ 147,949	0.4%
New - Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Maintenance																												
Furnace Clean and Tune	Home	27,990	-	-	195,272	\$ 1,556,678	2.3%	Home	10,952	-	-	76,971	\$ 632,378	2.4%	Home	17,038	-	-	118,301	\$ 924,299	2.2%	Home	14,230	-	-	102,941	\$ 745,951	2.2%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%
Lighting																												
Compact Fluorescent Lights (CFL)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Interior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Torchiere	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
LED Night Lights	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%
Pilots																												
Customer Enrollment																												
Outreach & Assessment	Home	99,860				\$ 14,888,447	21.6%	Home	38,371	-	-	-	\$ 5,750,248	21.5%	Home	61,489				\$ 9,138,199	21.6%	Home	52,798				\$ 4,777,664	14.0%
In-Home Education	Home	75,260				\$ 1,128,368	1.6%	Home	25,414	-	-	-	\$ 380,873	1.4%	Home	49,846				\$ 747,495	1.8%	Home	41,356				\$ 620,460	1.8%
Total Savings/Expenditures			-	-	1,552,610	\$ 68,985,233	0%			-	-	607,583	\$ 26,712,411				-	-	945,027	\$ 42,272,822				-	-	710,628	\$ 34,112,372	
Total Households Weatherized ²		97,664							37,751							59,913							55,275					
Households Treated	Total (K+S)							First Touches							Re-treated Homes/Go-Backs							Aliso Canyon						
- Single Family Households Treated	Home	60,716						Home	21,906						Home	38,810						Home	29,827					
- Multi-family Households Treated	Home	26,412						Home	11,069						Home	15,343						Home	21,523					
- Mobile Homes Treated	Home	6,662						Home	2,391						Home	4,271						Home	1,448					
Total Number of Households Treated	Home	93,790						Home	35,366						Home	58,424						Home	52,798					
# Eligible Households to be Treated for PY ³	Home	110,000						Home							Home							Home						
% of Households Treated	%	85%						%	0%						%	0%						%						
- Master-Meter Households Treated	Home																											

¹ Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

² Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs

³ Based on OP 79 of D.16-11-022.

⁴ All savings are calculated based on the following sources:

Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013

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

⁶ Data for Aliso Canyon includes "First Touches and Re-Treatments".

	A	B	C	D	E	F	G	H
1	PY 2017 Energy Savings Assistance Program Annual Report							
2	ESA Program Table 2A							
3	ESA Program Expenses and Energy Savings by Measures Installed							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5		ESA Program - CSD Leveraging						
6			Year-To-Date Completed & Expensed Installation					
7	Measures	Units	Quantity Installed	kWh ³ (Annual)	kW ³ (Annual)	Therms ³ (Annual)	Expenses (\$)	% of Expenditure
8	Appliances							
9	High Efficiency Clothes Washer	Each						0.0%
10	Refrigerators	Each						0.0%
11	Microwaves ⁴	Each						0.0%
12	Domestic Hot Water							
13	Water Heater Blanket	Home						0.0%
14	Low Flow Shower Head	Home						0.0%
15	Water Heater Pipe Insulation	Home						0.0%
16	Faucet Aerator	Home						0.0%
17	Water Heater Repair/Replacement	Each						0.0%
18	Thermostatic Shower Valve	Each						0.0%
19	New - Combined Showerhead/TSV	Each						0.0%
20	New - Heat Pump Water Heater	Each						0.0%
21	New - Tub Diverter/ Tub Spout	Each						0.0%
22	New - Thermostat-controlled Shower Valve	Each						0.0%
23	Enclosure							
24	Air Sealing / Envelope ¹	Home						0.0%
25	Caulking	Home						0.0%
26	Attic Insulation	Home						0.0%
27	HVAC							
28	FAU Standing Pilot Conversion	Each						0.0%
29	Furnace Repair/Replacement	Each						0.0%
30	Room A/C Replacement	Each						0.0%
31	Central A/C replacement	Each						0.0%
32	Heat Pump Replacement	Each						0.0%
33	Evaporative Cooler (Replacement)	Each						0.0%
34	Evaporative Cooler (Installation)	Each						0.0%
35	Duct Testing and Sealing	Home						0.0%
36	New - Energy Efficient Fan Control	Home						0.0%
37	New - Prescriptive Duct Sealing	Home						0.0%
38	New - High Efficiency Forced Air Unit (HE FAU)	Home						0.0%
39	New - A/C Time Delay	Home						0.0%
40	Maintenance							
41	Furnace Clean and Tune	Home						0.0%
42	Central A/C Tune up	Home						0.0%
43	Lighting							
44	Compact Fluorescent Lights (CFL)	Each						0.0%
45	Interior Hard wired CFL fixtures	Each						0.0%
46	Exterior Hard wired CFL fixtures	Each						0.0%
47	Torchiere	Each						0.0%
48	Occupancy Sensor	Each						0.0%
49	LED Night Lights	Each						0.0%
50	New - LED Diffuse Bulb (60W Replacement)	Each						0.0%
51	New - LED Reflector Bulb	Each						0.0%
52	New - LED Reflector Downlight Retrofit Kits	Each						0.0%
53	New - LED A-Lamps	Each						0.0%
54	Miscellaneous							
55	Pool Pumps	Each						0.0%
56	Smart Power Strips - Tier 1	Each						0.0%
57	New - Smart Power Strips - Tier 2	Each						0.0%
58	Pilots							
59								
60	Customer Enrollment							
61	Outreach & Assessment	Home					\$ -	0.0%
62	In-Home Education	Home					\$ -	0.0%
63								
64	Total Savings/Expenditures			-	-	-	\$ -	0.0%
65								
66	Total Households Weatherized ²							
67								
68	CSD MF Buildings Treated		Total					
69								
70	- Multi-family							
71								
72								
73	¹ Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.							
74	² Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.							
75	³ All savings are calculated based on the following sources:							
76	Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013							
77	⁴ Microwave savings are from ECONorthWest Studies received in December of 2011.							

PY 2017 Energy Savings Assistance Program Annual Report
ESA Program Table 2B
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

Measures	ESA Program - Multifamily Common Area ¹						
	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh ² (Annual)	kW ² (Annual)	Therms ² (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each						0.0%
Refrigerators	Each						0.0%
Microwaves ³	Each						0.0%
Domestic Hot Water							
Water Heater Blanket	Home						0.0%
Low Flow Shower Head	Home						0.0%
Water Heater Pipe Insulation	Home						0.0%
Faucet Aerator	Home						0.0%
Water Heater Repair/Replacement	Each						0.0%
Thermostatic Shower Valve	Each						0.0%
New - Combined Showerhead/TSV	Each						0.0%
New - Heat Pump Water Heater	Each						0.0%
New - Tub Diverter/ Tub Spout	Each						0.0%
New - Thermostat-controlled Shower Valve	Each						0.0%
Enclosure							
Air Sealing / Envelope ⁴	Home						0.0%
Caulking	Home						0.0%
Attic Insulation	Home						0.0%
HVAC							
FAU Standing Pilot Conversion	Each						0.0%
Furnace Repair/Replacement	Each						0.0%
Room A/C Replacement	Each						0.0%
Central A/C replacement	Each						0.0%
Heat Pump Replacement	Each						0.0%
Evaporative Cooler (Replacement)	Each						0.0%
Evaporative Cooler (Installation)	Each						0.0%
Duct Testing and Sealing	Home						0.0%
New - Energy Efficient Fan Control	Home						0.0%
New - Prescriptive Duct Sealing	Home						0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home						0.0%
New - A/C Time Delay	Home						0.0%
Maintenance							
Furnace Clean and Tune	Home						0.0%
Central A/C Tune up	Home						0.0%
Lighting							
Compact Fluorescent Lights (CFL)	Each						0.0%
Interior Hard wired CFL fixtures	Each						0.0%
Exterior Hard wired CFL fixtures	Each						0.0%
Torchiere	Each						0.0%
Occupancy Sensor	Each						0.0%
LED Night Lights	Each						0.0%
New - LED Diffuse Bulb (60W Replacement)	Each						0.0%
New - LED Reflector Bulb	Each						0.0%
New - LED Reflector Downlight Retrofit Kits	Each						0.0%
New - LED A-Lamps	Each						0.0%
Miscellaneous							
Pool Pumps	Each						0.0%
Smart Power Strips - Tier 1	Each						0.0%
New - Smart Power Strips - Tier 2	Each						0.0%
Ancillary Services							
Commissioning ⁵	Home						0.0%
Audit	Home						0.0%
Administration ⁶	Home					\$ 17,520	100.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home					\$ -	0.0%
In-Home Education	Home					\$ -	0.0%
Total Savings/Expenditures			-	-	-	\$ 17,520	100.0%
Total Multifamily Buildings Weatherized ⁷							
Multifamily Buildings Treated	Total						
- Multifamily							

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

² All savings are calculated based on the following sources:

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

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

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

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

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

Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.

	A	B	C	D	E
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 3 Program Cost Effectiveness SOUTHERN CALIFORNIA GAS COMPANY				
2	Ratio of Benefits Over Costs			Net Benefits \$	
3	ProgramYear	ESACET	Resource TRC	ESACET	Resource TRC
4	2017	0.76	0.26	\$ (17,945,005)	\$ (28,471,460)
5	Notes: - All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC. - The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs. - The Resource TRC includes energy benefits and program measure and installation costs. - Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report. - Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.				
6					
7					
8					
9					
10					
11					

PY 2017 Energy Savings Assistance Program Annual Report
ESA Program Table 4
Detail by Housing Type and Source 1
SOUTHERN CALIFORNIA GAS COMPANY

		2017 Energy Savings ²				
Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm)	2017 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		49,926	-	-	1,044,902	47,091,059
	Single Family	43,212			940,281.6	\$ 42,407,806
	Multi Family	684			7,349.4	\$ 504,584
	Mobile Homes	6,030			97,271.3	\$ 4,178,668
Renters - Total		43,864	-	-	507,708	21,894,174
	Single Family	17,504			330,570.3	\$ 11,246,116
	Multi Family	25,728			166,463.7	\$ 10,292,448
	Mobile Homes	632			10,673.6	\$ 355,611
Gas and Electric Total						
Multi Family Common Area Bldgs - Total						
Totals:		93,790	-	-	1,552,610	68,985,233

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

² Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.

Penetration History				
Year	Homes Treated ³	Ineligible & Unwilling ⁴	Estimated Eligible in Current Year ⁵	Current Year Penetration Rate for Homes Treated
2002	49,464			
2003	57,179			
2004	54,677			
2005	40,523			
2006	36,870			
2007	44,048			
2008	58,773			
2009	83,493	3,562		
2010	120,358	22,589		
2011	161,020	23,765		
2012	96,893	20,383	136,836	71%
2013	106,948	12,310	136,836	78%
2014	92,967	10,029	136,836	68%
2015	80,316	8,819	136,836	59%
2016	69,811	12,656	136,836	51%
2017	93,790	10,017	136,836	69%
2018				
2019				
2020				
Total Homes Treated since 2002	1,247,130	124,130		

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

⁴ Ineligible & Unwilling defined in ESA Table 8.

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

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2017	PG&E	97,210	2,706
2017	SCE	1,190,019	30,240
2017	SDG&E	19,952	184

	A	B	C	D	E	F	G
1	PY 2017 Energy Savings Assistance Program Annual Report						
2	ESA Program Table 5						
3	ESA Program Direct Purchases & Installation Contractors ¹						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5			Contractor Type (Check one or more if applicable)				2017 Annual Expenditures ³
6	Contractor	County ²	Private	CBO	WMDVBE	LIHEAP	
7	ADVANCED CONTRACTING SERVICES INC	Ke	x	-	-	-	\$ 189,177
8	AMERICAN ECO SERVICES INC	SD, Sba, SLO	x	-	x	-	\$ 1,185,413
9	AMERICAN INSULATION INC	R, I	x	-	x	-	\$ 1,117,919
10	APPLIANCE RECYCLING CENTERS OF AMERICA	LA	x	-	-	-	\$ 6,434,287
12	ASSERT INC	LA, Ke	-	x	-	-	\$ 510,573
13	ASSOCIATED CONSTRUCTION SERVICES	LA, OC, Sbe, R	x	-	x	-	\$ 1,836,291
14	AVALON CARVER COMMUNITY CENTER INC	LA	-	x	-	-	\$ 10,144
17	CAMPESINOS UNIDOS INC	R, I	-	x	x	x	\$ 494,847
18	COMMUNITY ACTION COMMISSION (SANTA BARBARA COUNTY)	Sba	-	x	-	x	\$ 34,488
19	COMMUNITY ACTION OF VENTURA COUNTY	V, LA	-	x	-	x	\$ 29,460
21	COMMUNITY ACTION PARTNERSHIP OF (SAN LUIS OBISPO)	SLO,	-	x	x	x	\$ 332,986
23	COMMUNITY ACTION PARTNERSHIP OF O C	OC	-	x	x	x	\$ 127,670
26	EAGLE SYSTEMS INTERNATIONAL INC	LA, R, T, Ki	x	-	-	-	\$ 3,702,117
27	EAST LOS ANGELES COMMUNITY UNION	LA, R, OC, Sbe	-	x	x	-	\$ 11,795,294
30	ECONO WEST INC	LA, Ke	x	-	x	-	\$ 729,772
32	ENVIRONMENTAL ASSESSMENT SERVICES	I, LA, OC, R, Sbe	x	-	x	-	\$ 886,017
33	FCI MANAGEMENT CONSULTANTS	LA, OC, SD	x	-	x	-	\$ 203,635
34	GARCIA & SON'S HOME IMPROVEMENT INC	Ke, LA, T, Ki, F	x	-	x	-	\$ 432,104
37	HIGHLANDS ENERGY SERVICES INC	T, Ki, F	x	-	x	-	\$ 864,952
38	JOHN HARRISON CONTRACTING INC	R, Sbe	x	-	x	-	\$ 175,938
40	MARAVILLA FOUNDATION	LA, OC, Sbe, R, K	-	x	x	x	\$ 12,074,254
43	PACIFIC ASIAN CONSORTIUM IN	ALL, LA, OC, V, Sbe, R, SFERN	-	x	x	x	\$ 509,356
45	PROTEUS INC	T, LA, OC, V, Sbe, R, I, SC, SFERN, Ki, Ke, Sba, SLO, F	-	x	-	-	\$ 3,490,704
46	QUALITY CONSERVATION SERVICES INC	LA, OC, Sbe, R, SC, SF, CC, S	x	-	-	-	\$ 2,632,781
47	RELIABLE ENERGY MANAGEMENT INC	LA, OC, V, Sbe, R, SFERN, T, Ki, Ke, Sba, SLO, F	x	-	x	-	\$ 7,037,227
48	RICHARD HEATH & ASSOCIATES INC	ALL, LA, OC, V, Sbe, R, I, Ke, Sba, SLO	x	-	x	-	\$ 921,408
49	SIERRA WEATHERIZATION COMPANY INC	LA, V, OC, SC, AL, Scr	x	-	-	-	\$ 5,784,611
50	SILICON VALLEY FOUNDATION	SC, OC, LA	x	-	x	-	\$ 1,323,259
51	SOCO AIR CONDITIONING CO	LA, OC, R, Sbe	x	-	-	-	\$ 243,464
53	SPECIALTY AC HEAT INC	SBN, LA, RIVR, SFERN, OC	x	-	x	-	\$ 824,208
54	STAPLES & ASSOC	T, Ki, F, Ke	x	-	-	-	\$ 601,985
57	TONY'S HEATING & A/C SERVICE INC.	LA, OC, SFERN	x	-	x	x	\$ 362,969
58	TRI-STATE HOME IMPROVEMENTS INC	R	x	-	x	-	\$ 193,072
59	TRUTEAM OF CALIFORNIA INC	LA, R, Sbe, I, Ke, Ki, Tu, OC, V, T, F, SFERN	x	-	-	x	\$ 4,417,141
60	VETERANS IN COMMUNITY SERVICES INC	LA	-	x	x	-	\$ 933,069
61	WATTS LABOR COMMUNITY ACTION COMM	LA	-	x	x	-	\$ 170,349
62	WESTERN INSULATION LP	LA, R, Sbe, I, Ke, Ki, Tu	x	-	-	x	\$ 19,255
64							
65	Total Contractor Expenditures						\$ 72,632,198
66							
67	¹ Summary data which includes ESA Program, CSD Leveraging, and MF efforts.						
68	² Key						
69	Alameda	AL					
70	Los Angeles	LA					
71	Orange County	OC					
72	Ventura	V					
73	San Bernardino	Sbe					
74	Riverside	R					
75	Imperial	I					
76	Tulare	T					
77	Kings	Ki					
78	Kern	Ke					
79	Santa Barbara	Sba					
80	San Luis Obispo	SLO					
81	Fresno	F					
82	San Diego	SD					
83	San Fernando	SFERN					
84	Santa Clara	SC					
85	San Francisco	SF					
86	Santa Cruz	Scr					
87	Contra Costa	CC					
88	Solano	S					
89							
90	³ The expenditures do not include a credit of (\$97,585) for the high efficiency clothes washer rebates from Municipal Water Companies and misc. revenues, adjustments of (\$725,923), and corrections of (\$1,539). \$72,632,198 - \$97,585 - \$725,923 - \$1,539 = \$71,807,152. (See ESAP Table - 7 Contract)						

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 6 ESA Program Installation Cost of Program Installation Contractors ¹ SOUTHERN CALIFORNIA GAS COMPANY																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2017 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs ²	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	74,750	80%	74,750	80%	\$ 45,710,449	67%	19,040	20%	19,040	20%	\$ 22,909,217	33%	93,790	93,790	\$ 68,619,665	\$ 732	\$ 732
6	Appliances																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	-	0%	7,928	100%	7,928	100%	6,285,563	100%	7,928	7,928	\$ 6,285,563	\$ 793	\$ 793
8	Refrigerators (N/A)	Each													-	-	\$ -	\$ -	\$ -
9	Microwaves (N/A)	Each													-	-	\$ -	\$ -	\$ -
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	946	46%	946	46%	54,027	46%	1,100	54%	1,100	54%	62,981	54%	2,046	2,046	\$ 117,008	\$ 57	\$ 57
12	Low Flow Shower Head	Home	88,008	71%	63,936	73%	2,733,056	71%	36,383	29%	23,508	27%	1,136,515	29%	124,391	87,444	\$ 3,869,571	\$ 31	\$ 44
13	Water Heater Pipe Insulation	Home	1,247	57%	1,156	57%	25,588	57%	940	43%	883	43%	19,553	43%	2,187	2,039	\$ 45,142	\$ 21	\$ 22
14	Faucet Aerator	Home	123,514	74%	62,805	75%	903,040	74%	42,522	26%	21,085	25%	310,758	26%	166,036	83,890	\$ 1,213,797	\$ 7	\$ 14
15	Water Heater Repair/Replacement	Each	1,248	82%	1,248	82%	1,860,805	81%	281	18%	280	18%	426,717	19%	1,529	1,528	\$ 2,287,521	\$ 1,496	\$ 1,497
16	Thermostatic Shower Valve	Each	74,099	70%	54,351	73%	3,293,535	70%	31,404	30%	20,571	27%	1,394,546	30%	105,503	74,922	\$ 4,688,081	\$ 44	\$ 63
17	New - Combined Showerhead/TSV (N/A)	Each																	
18	New - Heat Pump Water Heater (N/A)	Each																	
19	New - Tub Diverter/ Tub Spout	Each	2,558	92%	2,197	93%	271,487	92%	218	8%	172	7%	23,003	8%	2,776	2,369	\$ 294,489	\$ 106	\$ 124
20	New - Thermostat-controlled Shower Valve	Each																	
21	Enclosure																		
22	Air Sealing / Envelope	Home	52,955	72%	52,955	72%	12,154,122	70%	20,847	28%	20,847	28%	5,163,414	30%	73,802	73,802	\$ 17,317,536	\$ 235	\$ 235
23	Attic Insulation	Home	2,656	55%	2,656	55%	3,199,902	53%	2,139	45%	2,139	45%	2,855,601	47%	4,795	4,795	\$ 6,055,503	\$ 1,263	\$ 1,263
24	HVAC																		
25	FAU Standing Pilot Light Conversion	Each	10	77%	9	75%	3,307	78%	3	23%	3	25%	921	22%	13	12	\$ 4,228	\$ 325	\$ 352
26	Furnace Repair/Replacement	Each	5,797	87%	5,622	87%	7,488,026	84%	881	13%	869	13%	1,379,707	16%	6,678	6,491	\$ 8,867,733	\$ 1,328	\$ 1,366
27	Room A/C Replacement (N/A)	Each																	
28	Central A/C Replacement (N/A)	Each																	
29	Heat Pump Replacement (N/A)	Each																	
30	Evaporative Coolers (Replacement) (N/A)	Each																	
31	Evaporative Coolers (Installation) (N/A)	Each																	
32	Duct Testing and Sealing (N/A)	Home																	
33	New - Energy Efficient Fan Control (N/A)	Home																	
34	New - Prescriptive Duct Sealing (N/A)	Home																	
35	New - High Efficiency Forced Air Unit (HE FAU)	Home																	
36	New - A/C Time Delay (N/A)	Home																	
37	Maintenance																		
38	Furnace Clean and Tune	Home	21,296	74%	20,769	74%	1,136,180	73%	7,601	26%	7,221	26%	420,497	27%	28,897	27,990	\$ 1,556,678	\$ 54	\$ 56
39	Central A/C Tune-up (N/A)	Home																	
40	Evaporative Cooler Maintenance (N/A)	Home																	
41	Lighting																		
42	Compact Fluorescent Lights (CFLs) (N/A)	Each																	
43	Interior Hard wired CFL fixtures (N/A)	Each																	
44	Exterior Hard wired CFL fixtures (N/A)	Each																	
45	Torchiere (N/A)	Each																	
46	Occupancy Sensor (N/A)	Each																	
47	LED Night Lights (N/A)	Each																	
48	New - LED Diffuse Bulb (60W Replacement)	Each																	
49	New - LED Reflector Bulb (N/A)	Each																	
50	New - LED Reflector Downlight Retrofit Kits (N/A)	Each																	
51	New - LED A-Lamps (N/A)	Each																	
52	Miscellaneous																		
53	Pool Pumps (N/A)	Each																	
54	Smart Power Strips (N/A)	Each																	
55	New - Smart Power Strips - Tier 2 (N/A)	Each																	
56	Ancillary Services																		
57	Commissioning	Home																	
58	Audit	Home																	
59	Administration	Home																	
60	Pilots																		
61		Each																	
62		Each																	
63	Customer Enrollment																		
64	Outreach & Assessment	Home	74,750	80%	74,750	80%	11,680,632	78%	19,040	20%	19,040	20%	3,207,815	22%	93,790	93,790	\$ 14,888,447	\$ 159	\$ 159
65	In-Home Education	Home	60,470	80%	60,470	80%	906,743	80%	14,790	20%	14,790	20%	221,625	20%	75,260	75,260	\$ 1,128,368	\$ 15	\$ 15
66																			
67	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.																		
68	² The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1.																		
69	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.																		

	A	B	C	D	E
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element ¹ SOUTHERN CALIFORNIA GAS COMPANY				
2					
3	ESA Program:	Labor ²	Non-Labor ³	Contractor ⁴	Total
4	Energy Efficiency				
5	Appliances	\$ -	\$ -	\$ 5,896,013	\$ 5,896,013
6	Domestic Hot Water	\$ -	\$ -	\$ 12,726,839	\$ 12,726,839
7	Enclosure	\$ -	\$ -	\$ 24,670,314	\$ 24,670,314
8	HVAC	\$ -	\$ 594	\$ 9,852,977	\$ 9,853,571
9	Maintenance	\$ -	\$ -	\$ 1,562,231	\$ 1,562,231
10	Lighting	\$ -	\$ -	\$ -	\$ -
11	Miscellaneous	\$ -	\$ -	\$ -	\$ -
12	Customer Enrollment	\$ 365,416	\$ 63,740	\$ 14,515,523	\$ 14,944,679
13	In Home Education	\$ -	\$ 74,537	\$ 1,130,918	\$ 1,205,454
14	Pilot	\$ -	\$ -	\$ -	\$ -
15	Energy Efficiency TOTAL	\$ 365,416	\$ 138,871	\$ 70,354,814	\$ 70,859,101
16					
17	Training Center	\$ 610,410	\$ 7,919	\$ -	\$ 618,329
18	Inspections	\$ -	\$ -	\$ 1,452,338	\$ 1,452,338
19	Marketing and Outreach	\$ 72,921	\$ 918,351	\$ -	\$ 991,272
20	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
21	Measurement and Evaluation Studies	\$ -	\$ 192,970	\$ -	\$ 192,970
22	Regulatory Compliance	\$ 259,600	\$ 47,439	\$ -	\$ 307,039
23	General Administration	\$ 3,761,788	\$ 1,129,015	\$ -	\$ 4,890,804
24	CPUC Energy Division	\$ -	\$ 52,352	\$ -	\$ 52,352
25					
26	TOTAL PROGRAM COSTS	\$ 5,070,135	\$ 2,486,917	\$ 71,807,152	\$ 79,364,204
27					
28	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				
29	² Define Labor - Utility staff labor including labor indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects)				
30	³ Define Non-Labor - All other non-labor costs excluding contractor costs defined below.				
31	⁴ Define Contractor - Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In Home Energy Education services.				

	A	B	C	D	E	F	G	H
1	PY 2017 Energy Savings Assistance Program Annual Report ¹ ESA Program Table 8 ESA Program Homes Unwilling / Unable to Participate SOUTHERN CALIFORNIA GAS COMPANY							
2	Reason Provided							
3	County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
4	Fresno	7	0	0	0	1	1	1
5	Imperial	899	0	0	0	118	6	37
6	Kern	37	4	0	0	3	7	4
7	Kings	30	0	0	0	4	1	0
8	Los Angeles	1,918	33	0	0	353	193	59
9	Orange	317	22	0	0	62	45	14
10	Riverside	2,888	10	0	0	534	208	71
11	San Bernardino	1,428	10	0	0	98	119	20
12	San Luis Obispo	8	1	0	0	5	0	4
13	Santa Barbara	2	3	0	0	3	0	0
14	Tulare	294	0	0	0	10	4	2
15	Ventura	100	0	0	0	16	1	2
16	Total	7,928	83	0	0	1,207	585	214
17								
18	¹ Summary data which includes ESA Program and CSD Leveraging efforts.							
19								
20								
21	ESA Coordinated Treatment (SCE and SoCalGas only)							
22		Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency ¹						
23	# of Households Received Measures from one Utility, but not other Utility or Partnering Agency ²	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible		
24								
25								
26	5,479	847	3,218	-	617	743		
27								
28	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
29	² Total homes reported treated by SCE in 2017, within the joint SoCalGas-SCE territory, that were not treated by SoCalGas in 2017 for the reasons provided at right. In addition to the homes shown in this table, there were 10,648 homes reported treated by SCE in 2017 within SoCalGas-SCE joint territory that could not be matched to a SoCalGas service address and therefore could not be assessed as to whether they were jointly treated. The table also excludes additional units reported treated by SCE but not by SoCalGas in 2017, within the joint SCE-SoCalGas territory, as follows: 21,290 homes treated in prior years 2002-2016 by SoCalGas; 3,163 homes not jointly treated for unknown reasons; 1,852 homes for which a SoCalGas enrollment remained in progress at year end.							

	A	B	C	D	E	F	G
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 9 Life Cycle Bill Savings by Measure ^{1, 3}						
2	SOUTHERN CALIFORNIA GAS COMPANY						
3	Measure Description		2017 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2017 Total Measure Life Cycle Bill Savings
4	Appliances						
5	High Efficiency Clothes Washer	Each	7,928		30.88	11	\$ 1,590,169
6	Refrigerators	Each					
7	Microwaves ²	Each					
8	Domestic Hot Water						
9	Water Heater Blanket	Home	2,046		2.41	3.7	\$ 5,092
10	Low Flow Shower Head	Home	87,444		1.45	10	\$ 584,896
11	Water Heater Pipe Insulation	Home	2,039		1.77	11	\$ 9,968
12	Faucet Aerator	Home	83,890		3.29	10	\$ 3,622,338
13	Water Heater Repair/Replacement	Each	1,529		3.49	11	\$ 22,696
14	Thermostatic Shower Valve	Each	105,503		2.34	10	\$ 860,401
15	New - Combined Showerhead/TSV	Each					
16	New - Heat Pump Water Heater	Each					
17	New - Thermostatic Tub Spout	Each	2,776		8.12	10	\$ 135,520
18	New - Thermostat-controlled Shower Valve	Each					
19	Enclosure						
20	Air Sealing / Envelope	Home	73,802		3.76	11	\$ 1,801,785
21	Attic Insulation	Home	4,795		26.88	20	\$ 1,287,686
22	HVAC						
23	FAU Standing Pilot Light Conversion	Each	13		42.00	6.7	\$ 2,134
24	Furnace Repair/Replacement	Each	6,678		0.00	20	
25	Room A/C Replacement	Each					
26	Central A/C Replacement	Each					
27	Heat Pump Replacement	Each					
28	Evaporative Coolers (Replacement)	Each					
29	Evaporative Coolers (Installation)	Each					
30	Duct Testing and Sealing	Home	1,273		15.28	18	\$ 181,273
31	New - Energy Efficient Fan Control	Home					
32	New - Prescriptive Duct Sealing	Home					
33	New - High Efficiency Forced Air Unit (HE FAU)	Home					
34	New - A/C Time Delay	Home					
35	Maintenance						
36	Furnace Clean and Tune	Home	27,990		6.98	5	\$ 648,742
37	Central A/C Tune-up	Home					
38	Evaporative Cooler Maintenance	Home					
39	Lighting						
40	Compact Fluorescent Lights (CFLs)	Each					
41	Interior Hard wired CFL fixtures	Each					
42	Exterior Hard wired CFL fixtures	Each					
43	Torchiere	Each					
44	Occupancy Sensor	Each					
45	LED Night Lights	Each					
46	New - LED Diffuse Bulb (60W Replacement)	Each					
47	New - LED Reflector Bulb	Each					
48	New - LED Reflector Downlight Retrofit Kits	Each					
49	New - LED A-Lamps	Each					
50	Miscellaneous						
51	Pool Pumps	Each					
52	Smart Power Strips	Each					
53	New - Smart Power Strips - Tier 2	Each					
54	Ancillary Services						
55	Commissioning	Home					
56	Audit	Home					
57	Administration	Home					
58	Pilots						
59							
60							
61	Total		407,706				\$ 10,752,700
62							
63	Total Homes Served By the Program		93,790				
64	Life Cycle Bill Savings Per Home	-					\$ 114.65
65							
66	¹ Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.						
67	² For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
68	³ Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
69							
70	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.						

	A	B	C
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 10 Energy Rate Used for Bill Savings Calculations ^{1, 2} SOUTHERN CALIFORNIA GAS COMPANY		
2	Year	\$/kWh	\$/Therm
3	2017	0.00	0.72
4	2018	0.00	0.74
5	2019	0.00	0.76
6	2020	0.00	0.79
7	2021	0.00	0.81
8	2022	0.00	0.84
9	2023	0.00	0.86
10	2024	0.00	0.89
11	2025	0.00	0.91
12	2026	0.00	0.94
13	2027	0.00	0.97
14	2028	0.00	1.00
15	2029	0.00	1.03
16	2030	0.00	1.06
17	2031	0.00	1.09
18	2032	0.00	1.12
19	2033	0.00	1.16
20	2034	0.00	1.19
21	2035	0.00	1.23
22	2036	0.00	1.26
23	2037	0.00	1.30
24	2038	0.00	1.34
25	2039	0.00	1.38
26	2040	0.00	1.42
27	2041	0.00	1.47
28			
29	¹ Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.		
30	² For 2017, the average cost per kWh and therm paid by ESA Program participants is shown. Cost is escalated 3% annually for remaining years.		

	A	B	C	D	E
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 11 Bill Savings Calculations by Program Year¹ SOUTHERN CALIFORNIA GAS COMPANY				
2					
3	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
4	2013	\$ 97,554,614	\$ 14,434,223	0.15	\$ 135.00
5	2014	\$ 93,781,355	\$ 13,802,052	0.15	\$ 147.00
6	2015	\$ 74,817,588	\$ 9,458,585	0.13	\$ 118.00
7	2016	\$ 58,777,190	\$ 10,005,458	0.17	\$ 143.32
8	2017	\$ 79,364,204	\$ 10,752,700	0.14	\$ 114.65
9					
10					

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

PY 2017 Energy Savings Assistance Program Annual Report
ESA Program Table 12
Fund Shifting ¹
SOUTHERN CALIFORNIA GAS COMPANY

		Budget ¹			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			FUND SHIFT AMOUNT			Carry Forward from 2016			Carry Back from 2018								
Date	Program Year 2017	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/Electric ⁴	% of Authorized Total	1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
	ESA Program:	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%				G-xxxx, D.xx- xx-xxx
	Energy Efficiency																								
	Appliance	\$ -	\$ 16,450,664	\$ 16,450,664	\$ -	\$ 5,896,013	\$ 5,896,013	\$ -	\$ 10,554,651	\$ 10,554,651	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water	\$ -	\$ 25,541,417	\$ 25,541,417	\$ -	\$ 12,726,839	\$ 12,726,839	\$ -	\$ 12,814,578	\$ 12,814,578	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure	\$ -	\$ 31,356,733	\$ 31,356,733	\$ -	\$ 24,670,314	\$ 24,670,314	\$ -	\$ 6,686,419	\$ 6,686,419	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC	\$ -	\$ 23,190,540	\$ 23,190,540	\$ -	\$ 9,853,571	\$ 9,853,571	\$ -	\$ 13,336,969	\$ 13,336,969	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance	\$ -	\$ 1,922,439	\$ 1,922,439	\$ -	\$ 1,562,231	\$ 1,562,231	\$ -	\$ 360,208	\$ 360,208	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Customer Enrollment	\$ -	\$ 17,994,860	\$ 17,994,860	\$ -	\$ 14,944,679	\$ 14,944,679	\$ -	\$ 3,050,181	\$ 3,050,181	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	In Home Education	\$ -	\$ 5,021,521	\$ 5,021,521	\$ -	\$ 1,205,454	\$ 1,205,454	\$ -	\$ 3,816,067	\$ 3,816,067	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Fund Shifting Offset ²	\$ -		\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	\$ -	\$ 121,478,173	\$ 121,478,173	\$ -	\$ 70,859,101	\$ 70,859,101	\$ -	\$ 50,619,072	\$ 50,619,072	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center	\$ -	\$ 901,998	\$ 901,998	\$ -	\$ 618,329	\$ 618,329	\$ -	\$ 283,669	\$ 283,669	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	\$ -	\$ 2,509,088	\$ 2,509,088	\$ -	\$ 1,452,338	\$ 1,452,338	\$ -	\$ 1,056,750	\$ 1,056,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach	\$ -	\$ 1,450,000	\$ 1,450,000	\$ -	\$ 991,272	\$ 991,272	\$ -	\$ 458,728	\$ 458,728	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	M&E Studies ²	\$ -	\$ 115,625	\$ 115,625	\$ -	\$ 192,970	\$ 192,970	\$ -	\$ (77,345)	\$ (77,345)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 77,345	\$ -	\$ 77,345	\$ 77,345	-0.1%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules. 3.
	Regulatory Compliance	\$ -	\$ 471,807	\$ 471,807	\$ -	\$ 307,039	\$ 307,039	\$ -	\$ 164,768	\$ 164,768	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration	\$ -	\$ 6,356,574	\$ 6,356,574	\$ -	\$ 4,890,804	\$ 4,890,804	\$ -	\$ 1,465,770	\$ 1,465,770	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division	\$ -	\$ 86,000	\$ 86,000	\$ -	\$ 52,352	\$ 52,352	\$ -	\$ 33,648	\$ 33,648	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	\$ -	\$ 133,369,265	\$ 133,369,265	\$ -	\$ 79,364,204	\$ 79,364,204	\$ -	\$ 54,005,061	\$ 54,005,061	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 77,345	\$ -	\$ 77,345	\$ 77,345	-0.1%				
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ -	\$ 133,446,610	\$ 133,446,610	\$ -	\$ 79,364,204	\$ 79,364,204	\$ -	\$ 54,082,406	\$ 54,082,406	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					

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

¹ Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution G-3532 dated December 14, 2017 which addressed SoCalGas' Conforming Advice Letter 5111-A filed on April 4, 2017.

² Measurement and Evaluation studies authorized 2017 - 2020 budget is \$500,000 per Resolution G-3532.

	A	B
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 13 Categorical and Other Enrollment ¹ SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5	Type of Enrollment	Number of Homes Treated
6	Women, Infants, and Children Program (WIC)	7,845
7	Supplemental Security Income (SSI)	2,661
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,766
9	CalWORKs/Temporary Assistance for Needy Families (TANF)	247
10	Tribal TANF	5
11	Medicaid/Medi-Cal for Families	31,974
12	Healthy Families A&B	46
13	National School Lunch Program (NSLP) - Free Lunch	995
14	Low-income Home Energy Assistance Program (LIHEAP)	293
15	Bureau of Indian Affairs General Assistance	2
16	Head Start Income Eligible - (Tribal Only)	1
17	Total	45,835
18	¹ Summary data which includes ESA Program and CSD Leveraging efforts. Note: Does not include MF common area efforts.	
19		
20		

PY 2017 Energy Savings Assistance Program Annual Report
ESA Program Table 14
Leveraging & Integration⁶
SOUTHERN CALIFORNIA GAS COMPANY

Coordination Type ¹	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measureable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
Leveraging	Anaheim Public Utilities (APU)	SoCalGas has a signed leveraging contract with APU	Yes	Yes	\$ 752,825	485,508.80	N/A	735	See note "A".	Yes	N/A
Leveraging	Los Angeles Department of Water & Power (LADWP)	SoCalGas has a signed leveraging contract with LADWP	Yes	Yes	\$ 1,113,920	3,639,965.20	64,758,426.0	8,151	See note "A".	Yes	N/A
Leveraging	Pasadena Water and Power (PWP)	SoCalGas has a signed leveraging contract with PWP	Yes	Yes	\$ 31,131	44,177.00	N/A	64	See note "A".	Yes	N/A
Leveraging	EMWD	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 54,990	1,917.94	8.5	846	See note "A".	Yes	N/A
Leveraging	Liberty Utilities, formerly Park Water	Liberty Utilities co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 15,810	551.42	0.7	70	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	\$ 51,150	1,784.01	3.4	341	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	\$ 442,544	15,435.02	78.3	7,825	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	\$ 22,200	774.29	1.5	148	See note "A".	Yes	N/A

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

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

³ Annual Energy savings/benefits for measures installation in 2017. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households. Column G & H represents energy savings for kWh and gallons of water respectively.

⁴ Total Enrollments. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

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

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

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

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

	A	B	C	D	E	F
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 15 Lighting¹ SOUTHERN CALIFORNIA GAS COMPANY ESA Program CFL Tracking Table					
2						
3						
4						
5						
6	Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each					
7	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)²	AB 1109 Compliant?³
8						
9						
10						
11						
12						
13						
14						
15						
16						
17	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs⁴	
18	2009					
19	2010					
20	2011					
21	2012					
22	2013					
23	2014					
24	2015					
25	2016					
26	2017					
27						
28	¹ Summary data which includes ESA Program, CSD Leveraging, and MF efforts.					
29	² Bulb cost and admin cost were combined effective 2013.					
30	³ Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
31	Do all models comply with Europe's RoHS standards on toxicity?					
32	⁴ Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.					
33	Note: This Table should be used for 2017 and not applicable with 2018 activity pursuant to D.16-11-022 directive.					

	A	B	C	D	E	F	G
1	PY 2017 Energy Savings Assistance Program Annual Report ESA Program Table 16 "Add Back" Measures SOUTHERN CALIFORNIA GAS COMPANY						
2							
3							
4							
5	Ratio of Benefits Over Costs						
6	Measure ^{1, 2}	Climate Zone	ESACET	Resource TRC	Quantity Installed (Each or Home)	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
7	Air sealing, MF	4	2.36	0.35	8	\$1,555	\$527
8	Air sealing, MF	5	2.56	0.41	35	\$6,057	\$2,401
9	Air sealing, MF	6	0.13	0.01	509	\$82,483	\$893
10	Air sealing, MF	8	0.33	0.03	5,435	\$897,740	\$24,712
11	Air sealing, MF	9	0.38	0.03	9,297	\$1,416,932	\$45,894
12	Air sealing, MF	10	2.01	0.27	1,616	\$255,314	\$65,708
13	Air sealing, MF	13	2.88	0.52	418	\$66,560	\$33,830
14	Air sealing, MF	14	3.34	0.76	201	\$27,655	\$20,406
15	Air sealing, MF	15	0.15	0.01	471	\$76,485	\$918
16	Air sealing, MF	16	1.95	0.25	436	\$57,768	\$14,160
17	Air sealing, MH	4	2.63	0.43	27	\$4,399	\$1,843
18	Air sealing, MH	5	2.47	0.38	235	\$41,013	\$15,157
19	Air sealing, MH	6	3.16	0.65	211	\$25,733	\$16,309
20	Air sealing, MH	8	0.36	0.03	530	\$72,460	\$2,203
21	Air sealing, MH	9	0.86	0.08	473	\$71,154	\$5,745
22	Air sealing, MH	10	2.94	0.55	2,290	\$344,052	\$183,252
23	Air sealing, MH	13	2.75	0.47	212	\$33,301	\$15,285
24	Air sealing, MH	14	2.62	0.43	346	\$75,446	\$31,419
25	Air sealing, MH	15	0.00	0.00	621	\$117,306	\$0
26	Air sealing, MH	16	3.23	0.69	34	\$4,588	\$3,076
27	Air sealing, SF	4	2.14	0.29	206	\$48,848	\$13,916
28	Air sealing, SF	5	1.71	0.21	1,080	\$360,680	\$71,903
29	Air sealing, SF	6	0.17	0.01	983	\$262,241	\$3,512
30	Air sealing, SF	8	0.19	0.02	13,262	\$3,718,530	\$58,576
31	Air sealing, SF	9	0.27	0.02	10,394	\$2,880,064	\$64,812
32	Air sealing, SF	10	1.40	0.16	13,073	\$2,977,533	\$447,495
33	Air sealing, SF	13	1.77	0.22	5,072	\$1,780,548	\$374,248
34	Air sealing, SF	14	2.33	0.34	2,604	\$733,051	\$243,560
35	Air sealing, SF	15	0.00	0.00	2,569	\$585,577	\$0
36	Air sealing, SF	16	1.31	0.14	1,154	\$292,465	\$40,027
37	Attic insulation, MF	4	0.00	0.00	0	\$0	\$0
38	Attic insulation, MF	5	0.00	0.00	0	\$0	\$0
39	Attic insulation, MF	6	0.57	0.33	16	\$15,756	\$4,461
40	Attic insulation, MF	8	0.62	0.39	83	\$68,706	\$23,149
41	Attic insulation, MF	9	0.64	0.41	43	\$33,855	\$12,049
42	Attic insulation, MF	10	0.57	0.33	3	\$2,502	\$722
43	Attic insulation, MF	13	0.27	0.11	2	\$4,529	\$440
44	Attic insulation, MF	14	0.00	0.00	0	\$0	\$0
45	Attic insulation, MF	15	0.16	0.06	1	\$847	\$44
46	Attic insulation, MF	16	0.00	0.00	0	\$0	\$0
47	Attic insulation, SF	4	0.18	0.07	7	\$12,566	\$736
48	Attic insulation, SF	5	0.39	0.18	97	\$146,582	\$22,577
49	Attic insulation, SF	6	0.50	0.26	139	\$173,221	\$39,268
50	Attic insulation, SF	8	0.53	0.29	1,571	\$1,767,382	\$439,574
51	Attic insulation, SF	9	0.50	0.26	1,294	\$1,583,821	\$358,061
52	Attic insulation, SF	10	0.43	0.21	697	\$987,122	\$180,960
53	Attic insulation, SF	13	0.37	0.17	443	\$692,831	\$100,632
54	Attic insulation, SF	14	0.39	0.18	144	\$198,326	\$31,345
55	Attic insulation, SF	15	0.47	0.24	111	\$178,033	\$36,514
56	Attic insulation, SF	16	0.45	0.23	144	\$189,422	\$37,156
57	Duct sealing and testing, MF	All	0.00	0.00	10	\$2,654	\$0
58	Duct sealing and testing, MH	All	0.47	0.21	3	\$810	\$153
59	Duct sealing and testing, SF	All	0.79	0.57	1,260	\$362,104	\$181,120
60	FAU standing pilot light conversion, MF	All	0.73	0.50	3	\$975	\$492
61	FAU standing pilot light conversion, MH	All	0.75	0.53	2	\$623	\$328
62	FAU standing pilot light conversion, SF	All	0.73	0.50	8	\$2,630	\$1,313
63	Furnace clean and tune, MF	4	0.49	0.10	2	\$127	\$14
64	Furnace clean and tune, MF	5	0.49	0.10	1	\$64	\$7

	A	B	C	D	E	F	G
5	Ratio of Benefits Over Costs						
6	Measure ^{1, 2}	Climate Zone	ESACET	Resource TRC	Quantity Installed (Each or Home)	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
65	Furnace clean and tune, MF	6	0.58	0.12	359	\$18,725	\$2,505
66	Furnace clean and tune, MF	8	0.60	0.12	2,164	\$108,670	\$15,098
67	Furnace clean and tune, MF	9	0.59	0.12	3,897	\$197,245	\$27,188
68	Furnace clean and tune, MF	10	0.74	0.16	645	\$34,866	\$6,429
69	Furnace clean and tune, MF	13	0.79	0.18	20	\$980	\$199
70	Furnace clean and tune, MF	14	0.68	0.14	96	\$5,760	\$957
71	Furnace clean and tune, MF	15	0.39	0.07	283	\$16,021	\$1,316
72	Furnace clean and tune, MF	16	0.43	0.08	203	\$10,218	\$944
73	Furnace clean and tune, MH	4	0.83	0.19	2	\$112	\$25
74	Furnace clean and tune, MH	5	0.51	0.10	34	\$1,910	\$216
75	Furnace clean and tune, MH	6	0.00	0.00	15	\$784	\$0
76	Furnace clean and tune, MH	8	1.64	0.67	64	\$3,467	\$2,666
77	Furnace clean and tune, MH	9	1.57	0.60	73	\$4,023	\$2,770
78	Furnace clean and tune, MH	10	0.00	0.00	422	\$23,638	\$0
79	Furnace clean and tune, MH	13	0.00	0.00	7	\$362	\$0
80	Furnace clean and tune, MH	14	0.00	0.00	50	\$2,893	\$0
81	Furnace clean and tune, MH	15	2.02	1.31	157	\$8,773	\$13,290
82	Furnace clean and tune, MH	16	0.06	0.01	10	\$573	\$7
83	Furnace clean and tune, SF	4	0.51	0.10	70	\$4,234	\$488
84	Furnace clean and tune, SF	5	0.00	0.00	600	\$35,585	\$0
85	Furnace clean and tune, SF	6	1.61	0.63	333	\$19,490	\$14,260
86	Furnace clean and tune, SF	8	1.61	0.64	3,889	\$204,672	\$150,908
87	Furnace clean and tune, SF	9	1.56	0.59	3,565	\$197,019	\$134,309
88	Furnace clean and tune, SF	10	1.03	0.26	6,595	\$396,481	\$119,849
89	Furnace clean and tune, SF	13	0.00	0.00	846	\$43,104	\$0
90	Furnace clean and tune, SF	14	0.00	0.00	1,392	\$86,240	\$0
91	Furnace clean and tune, SF	15	1.96	1.17	1,756	\$105,337	\$142,055
92	Furnace clean and tune, SF	16	1.39	0.45	440	\$25,303	\$13,244
93	HE Clothes washer, MF	All	0.60	0.26	522	\$413,850	\$104,701
94	HE Clothes washer, MH	All	0.60	0.26	760	\$602,465	\$152,438
95	HE Clothes washer, SF	All	0.60	0.26	6,646	\$5,269,249	\$1,333,030
96	Heating system, MF	5	0.00	0.00	1	\$2,578	\$0
97	Heating system, MF	6	0.00	0.00	5	\$4,590	\$0
98	Heating system, MF	8	0.00	0.00	23	\$32,477	\$0
99	Heating system, MF	9	0.00	0.00	18	\$29,798	\$0
100	Heating system, MF	10	0.00	0.00	5	\$11,196	\$0
101	Heating system, MF	13	0.00	0.00	0	\$0	\$0
102	Heating system, MF	14	0.00	0.00	1	\$285	\$0
103	Heating system, MF	15	0.00	0.00	2	\$2,625	\$0
104	Heating system, MF	16	0.00	0.00	0	\$0	\$0
105	Heating system, MH	4	0.00	0.00	0	\$0	\$0
106	Heating system, MH	5	0.00	0.00	12	\$19,125	\$0
107	Heating system, MH	6	0.00	0.00	38	\$65,846	\$0
108	Heating system, MH	8	0.00	0.00	74	\$101,463	\$0
109	Heating system, MH	9	0.00	0.00	75	\$116,696	\$0
110	Heating system, MH	10	0.00	0.00	237	\$292,093	\$0
111	Heating system, MH	13	0.00	0.00	16	\$15,865	\$0
112	Heating system, MH	14	0.00	0.00	48	\$76,961	\$0
113	Heating system, MH	15	0.00	0.00	37	\$37,394	\$0
114	Heating system, MH	16	0.00	0.00	6	\$12,507	\$0
115	Heating system, SF	4	0.00	0.00	14	\$25,394	\$0
116	Heating system, SF	5	0.00	0.00	171	\$264,626	\$0
117	Heating system, SF	6	0.00	0.00	178	\$299,369	\$0
118	Heating system, SF	8	0.00	0.00	1,878	\$2,595,204	\$0
119	Heating system, SF	9	0.00	0.00	1,762	\$2,432,152	\$0
120	Heating system, SF	10	0.00	0.00	1,423	\$1,647,108	\$0
121	Heating system, SF	13	0.00	0.00	225	\$208,190	\$0
122	Heating system, SF	14	0.00	0.00	253	\$349,938	\$0
123	Heating system, SF	15	0.00	0.00	50	\$59,085	\$0
124	Heating system, SF	16	0.00	0.00	126	\$165,169	\$0
125	Low Flow Shower Head, MF	All	0.57	0.21	24,862	\$832,407	\$176,609
126	Low Flow Shower Head, MH	All	0.56	0.21	5,865	\$288,997	\$60,022
127	Low Flow Shower Head, SF	All	0.39	0.13	56,717	\$2,748,168	\$348,264

	A	B	C	D	E	F	G
5	Ratio of Benefits Over Costs						
6	Measure ^{1, 2}	Climate Zone	ESACET	Resource TRC	Quantity Installed (Each or Home)	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
128	Thermostatic Shower Valve, MF	All	0.51	0.18	23,639	\$1,050,617	\$190,691
129	Thermostatic Shower Valve, MH	All	0.81	0.39	7,791	\$346,087	\$134,608
130	Thermostatic Shower Valve, SF	All	0.40	0.16	74,073	\$3,291,377	\$535,102
131	Water Heater Blanket, MF	All	0.19	0.07	165	\$9,499	\$610
132	Water Heater Blanket, MH	All	0.27	0.10	223	\$12,748	\$1,213
133	Water Heater Blanket, SF	All	0.11	0.04	1,658	\$94,761	\$3,269
134	Water Heater Pipe Insulation, MF	All	0.70	0.43	193	\$4,281	\$1,768
135	Water Heater Pipe Insulation, MH	All	0.84	0.63	607	\$13,441	\$8,201
136	Water Heater Pipe Insulation, SF	All	0.00	0.00	1,239	\$27,420	\$0
137	Water heater repair and replace, MF	All	0.05	0.01	14	\$22,328	\$320
138	Water heater repair and replace, MH	All	0.05	0.01	273	\$437,048	\$6,242
139	Water heater repair and replace, SF	All	0.04	0.01	1,242	\$1,828,146	\$16,134
140	Faucet Aerator, MF	All	1.25	1.24	25,534	\$354,326	\$435,012
141	Faucet Aerator, MH	All	1.33	1.60	5,744	\$86,503	\$137,278
142	Faucet Aerator, SF	All	1.52	3.98	52,612	\$772,968	\$3,050,049
143	Thermostatic Tub Spout, MF	4	0.97	0.57	4	\$443	\$250
144	Thermostatic Tub Spout, MF	5	1.03	0.51	9	\$983	\$497
145	Thermostatic Tub Spout, MF	6	1.13	0.51	19	\$1,999	\$1,002
146	Thermostatic Tub Spout, MF	8	1.24	0.50	123	\$12,959	\$6,479
147	Thermostatic Tub Spout, MF	9	1.34	0.50	414	\$43,382	\$21,683
148	Thermostatic Tub Spout, MF	10	1.44	0.50	62	\$6,603	\$3,273
149	Thermostatic Tub Spout, MF	14	1.63	0.56	3	\$295	\$164
150	Thermostatic Tub Spout, MF	15	1.49	0.40	6	\$590	\$234
151	Thermostatic Tub Spout, MF	16	1.96	0.64	43	\$4,588	\$2,920
152	Thermostatic Tub Spout, MH	4	1.79	0.46	1	\$115	\$52
153	Thermostatic Tub Spout, MH	5	2.01	0.52	8	\$869	\$448
154	Thermostatic Tub Spout, MH	6	1.95	0.43	1	\$115	\$49
155	Thermostatic Tub Spout, MH	8	2.04	0.43	10	\$1,098	\$472
156	Thermostatic Tub Spout, MH	9	2.10	0.41	1	\$115	\$47
157	Thermostatic Tub Spout, MH	10	2.23	0.43	45	\$4,966	\$2,108
158	Thermostatic Tub Spout, MH	13	2.38	0.45	4	\$426	\$189
159	Thermostatic Tub Spout, MH	14	2.43	0.43	3	\$344	\$146
160	Thermostatic Tub Spout, MH	15	2.30	0.36	4	\$393	\$139
161	Thermostatic Tub Spout, MH	16	0.00	0.00	0	\$0	\$0
162	Thermostatic Tub Spout, SF	4	2.88	0.48	11	\$1,196	\$571
163	Thermostatic Tub Spout, SF	5	3.09	0.52	69	\$7,489	\$3,863
164	Thermostatic Tub Spout, SF	6	3.05	0.47	15	\$1,589	\$741
165	Thermostatic Tub Spout, SF	8	3.09	0.45	241	\$25,510	\$11,374
166	Thermostatic Tub Spout, SF	9	3.16	0.44	193	\$20,843	\$9,097
167	Thermostatic Tub Spout, SF	10	3.26	0.44	807	\$86,663	\$37,796
168	Thermostatic Tub Spout, SF	13	3.42	0.46	424	\$44,034	\$19,986
169	Thermostatic Tub Spout, SF	14	3.57	0.47	183	\$19,069	\$8,912
170	Thermostatic Tub Spout, SF	15	3.05	0.33	54	\$5,768	\$1,872
171	Thermostatic Tub Spout, SF	16	4.11	0.57	19	\$2,048	\$1,154
172							
173	Notes:						
174	¹ Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.						
175	² Summary data which includes ESA Program, CSD Leveraging, and MF Common Area						

PY 2017 Energy Savings Assistance Program Annual Report

ESA Program Table 17

Expenditures for Pilots and Studies

SOUTHERN CALIFORNIA GAS COMPANY

	Authorized 2017 Funding			2017 Expenses			% of Budget Expensed		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots									
Total Pilots	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Studies									
Rapid Feedback Research and Analysis	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%
Low Income Needs Assessment Study	\$ -	\$ 31,250	\$ 31,250	\$ -	\$ 124,711	\$ 124,711	\$ -	399%	399%
Load Impact Evaluation Study	\$ -	\$ 34,375	\$ 34,375	\$ -	\$ 68,259	\$ 68,259	\$ -	199%	199%
2017 Potential and Goals Study	\$ -	\$ 50,000	\$ 50,000	\$ -	\$ -	\$ -	\$ -	0%	0%
Total Studies	\$0	\$115,625	\$115,625	\$0	\$192,970	\$192,970	\$0	167%	167%

Note: Measurement and Evaluation studies authorized 2017 - 2020 budget is \$500,000, where 2017 spending shown to be over for 2017 due to annual budget allocation. See ESA Table 12.

PY 2017 Energy Savings Assistance Program Annual Report

ESA Program Table 18

SOUTHERN CALIFORNIA GAS COMPANY

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

Measures	Units	Households that Only Received Education
In-Home Education	Home	4,373

Households for My Energy/My Account Platform ¹		
Opt-Out	Already Enrolled	Opt-In

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

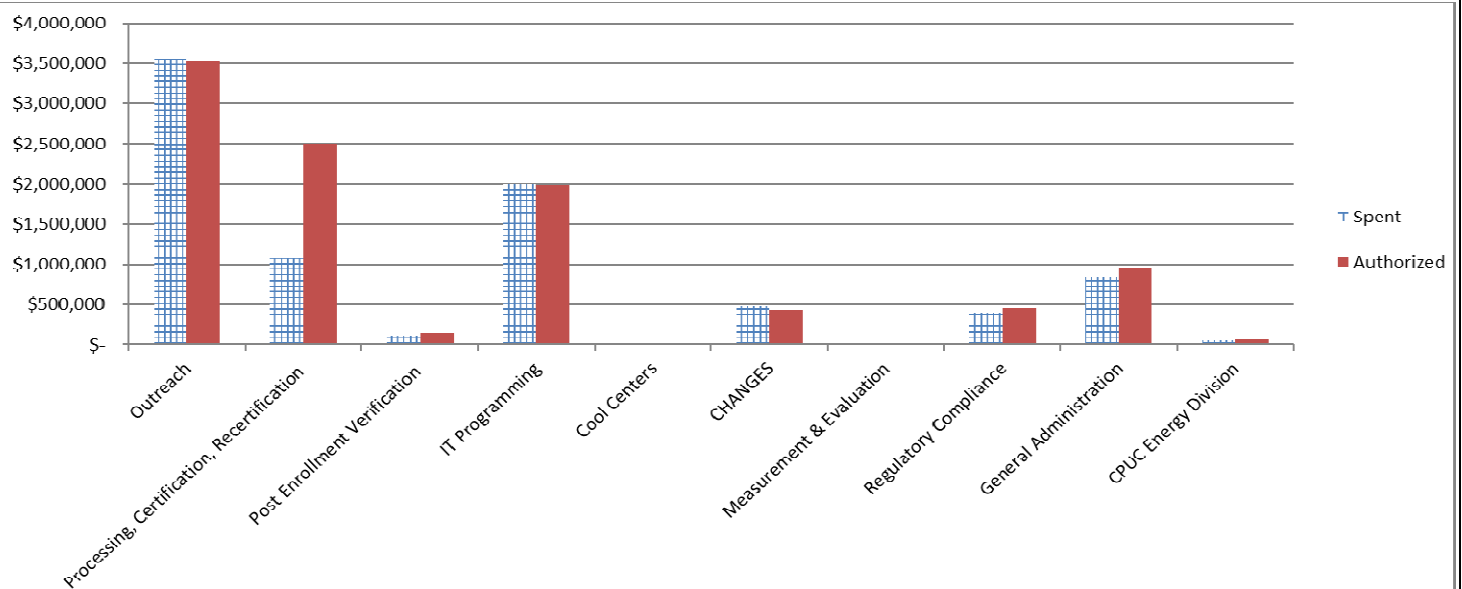
Households Received A/C Cycling Controls when A/C Installed	
	# Installed
A/C Cycling controls	N/A

¹ Data not available for 2017

	A	B	C	D	E	F	G	H
1	PY 2017 CARE 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	\$ -	\$ 3,560,766	\$ 3,560,766	\$ 3,539,732	101%	\$ 21,034	Funds shifted from Processing ,Cert, and Recert.
8	Processing, Certification, Recertification	\$ -	\$ 1,076,903	\$ 1,076,903	\$ 2,509,631	43%	\$ (31,043)	Funds shifted to Outreach and IT Programming.
9	Post Enrollment Verification	\$ -	\$ 122,862	\$ 122,862	\$ 148,382	83%		
10	IT Programming	\$ -	\$ 1,997,449	\$ 1,997,449	\$ 1,987,440	101%	\$ 10,009	Funds shifted from Processing ,Cert, and Recert.
11	Cool Centers	\$ -	\$ -	\$ -	\$ -			
12	CHANGES	\$ -	\$ 485,007	\$ 485,007	\$ 437,502	111%	\$ 47,505	Timing of 2016 payments billed and paid in 2017.
13	Measurement & Evaluation	\$ -	\$ -	\$ -	\$ -			
14	Regulatory Compliance	\$ -	\$ 402,288	\$ 402,288	\$ 456,031	88%		
15	General Administration	\$ -	\$ 836,157	\$ 836,157	\$ 952,404	88%		
16	CPUC Energy Division	\$ -	\$ 49,359	\$ 49,359	\$ 60,000	82%		
17								
18	TOTAL Program Costs	\$ -	\$ 8,530,791	\$ 8,530,791	\$ 10,091,122	84.54%	\$ 47,505	
19								
20	CARE Rate Discount	\$ -	\$ 105,702,810	\$ 105,702,810	\$ 128,608,105	82.19%	\$ -	
21	Service Establishment Charge Discount	\$ -	\$ 2,258,148	\$ 2,258,148	\$ 2,730,430	82.70%	\$ -	
22								
23	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ -	\$ 116,491,749	\$ 116,491,749	\$ 141,429,657	82.37%	\$ 47,505	

¹ Pursuant to D.16-11-022, the full year total budget has been updated to reflect Jan 2017 - Dec 2017. The Annual budget was approved in Resolution G-3532, D.16-11-022 and D.17-12-009.

Bar Chart 1 - Total Spent vs. Authorized by Category



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
4	SOUTHERN CALIFORNIA GAS COMPANY																								
5		New Enrollment									Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)	
6		Automatic Enrollment			Self-Certification (Income or Categorical)				Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ¹	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)					
7		Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone													Capitation				Combined (F+G+H+I)
8	January	4,735	1,596	86	6,417	1,770	9,281	435	3	11,489	17,906	12,511	11,914	13,059	37,484	10,014	1,144	395	9,947	21,500	55,390	-3,594	1,566,972	1,814,442	86.36%
9	February	4,480	1,360	101	5,941	2,750	8,173	633	0	11,556	17,497	10,523	9,740	15,195	35,458	10,179	1,187	352	10,807	22,525	52,955	-5,028	1,561,944	1,814,442	86.08%
10	March	4,651	1,898	199	6,748	2,783	10,553	569	0	13,905	20,653	18,795	15,373	21,979	56,147	8,726	1,262	447	11,773	22,208	76,800	-1,555	1,560,389	1,814,442	86.00%
11	April	4,318	1,742	270	6,330	2,016	15,590	403	0	18,009	24,339	14,904	13,070	17,944	45,918	8,143	1,102	434	7,905	17,584	70,257	6,755	1,567,144	1,818,305	86.19%
12	May	4,405	1,840	371	6,616	1,652	15,228	300	3	17,183	23,799	13,405	13,536	16,311	43,252	11,376	914	394	10,233	22,917	67,051	882	1,568,026	1,818,305	86.24%
13	June	5,887	1,796	367	8,050	1,631	13,525	262	1	15,419	23,469	13,611	15,735	18,647	47,993	11,002	983	499	13,235	25,719	71,462	-2,250	1,565,776	1,818,305	86.11%
14	July	5,846	1,487	253	7,586	1,850	9,796	259	0	11,905	19,491	9,696	12,889	14,681	37,266	11,690	912	424	11,550	24,576	56,757	-5,085	1,560,691	1,817,692	85.86%
15	August	6,807	1,588	191	8,586	2,025	10,635	241	2	12,903	21,489	21,255	15,959	16,238	53,452	11,074	1,399	324	12,228	25,025	74,941	-3,536	1,557,155	1,817,692	85.67%
16	September	7,469	2,004	179	9,652	2,130	11,138	188	0	13,456	23,108	15,984	14,346	13,724	44,054	10,637	1,181	454	11,480	23,752	67,162	-644	1,556,511	1,817,692	85.63%
17	October	6,995	1,495	168	8,658	7,288	10,789	171	2	18,250	26,908	13,322	16,877	13,532	43,731	12,009	1,313	444	12,469	26,235	70,639	673	1,557,184	1,819,451	85.59%
18	November	6,132	1,997	139	8,268	7,669	11,985	208	0	19,862	28,130	13,924	9,734	10,281	33,939	14,608	1,212	404	8,360	24,584	62,069	3,546	1,560,730	1,819,451	85.78%
19	December	3,444	1,945	87	5,476	7,103	11,088	186	0	18,377	23,853	10,259	15,335	8,217	33,811	10,889	1,192	389	7,987	20,457	57,664	3,396	1,564,126	1,819,451	85.97%
20	YTD Total	65,169	20,748	2,411	88,328	40,667	137,781	3,855	11	182,314	270,642	168,189	164,508	179,808	512,505	130,347	13,801	4,960	127,974	277,082	783,147	-6,440	1,564,126	1,819,451	85.97%
21																									
22	¹ Enrollments via data sharing between the IOUs.																								
23	² Enrollments via data sharing between departments and/or programs within the utility.																								
24	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																								
25	⁴ No response includes no response to both Recertification and Verification.																								

PY 2017 CARE Annual Report
CARE Table 3A
Post-Enrollment Verification Results (Model) 2017
SOUTHERN CALIFORNIA GAS COMPANY

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	1,566,972	2,293	0.15%	1,122	125	1,247	54.38%	0.08%
February	1,561,944	2,113	0.14%	1,082	130	1,212	57.36%	0.08%
March	1,560,389	2,269	0.15%	1,026	99	1,125	49.58%	0.07%
April	1,567,144	2,795	0.18%	1,556	136	1,692	60.54%	0.11%
May	1,568,026	2,603	0.17%	1,444	115	1,559	59.89%	0.10%
June	1,565,776	2,751	0.18%	1,596	124	1,720	62.52%	0.11%
July	1,560,691	2,209	0.14%	1,266	111	1,377	62.34%	0.09%
August	1,557,155	2,527	0.16%	1,264	139	1,403	55.52%	0.09%
September	1,556,511	2,703	0.17%	1,505	138	1,643	60.78%	0.11%
October	1,557,184	3,071	0.20%	1,756	144	1,900	61.87%	0.12%
November	1,560,730	3,572	0.23%	2,119	209	2,328	65.17%	0.15%
December	1,564,126	3,088	0.20%	1,231	176	1,407	45.56%	0.09%
YTD Total	1,564,126	31,994	2.05%	16,967	1,646	18,613	58.18%	1.19%

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 to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

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

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

PY 2017

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

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

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

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

	A	B	C	D	E	F	G
1	<p align="center">PY 2017 CARE Annual Report</p> <p align="center">CARE Table 4</p> <p align="center">CARE Self-Certification and Self-Recertification Applications ¹</p> <p align="center">SOUTHERN CALIFORNIA GAS COMPANY</p>						
2							
3							
4							
5		Provided ²	Received	Approved ³	Denied ⁴	Pending/Never Completed ⁵	Duplicates ⁶
6	Total (Y-T-D)	5,083,253	417,395	304,526	23,746	24,540	64,583
7	Percentage		100.00%	72.96%	5.69%	5.88%	15.47%
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 2017 CARE Annual Report CARE Table 5 CARE Enrollment by County SOUTHERN CALIFORNIA GAS COMPANY									
2										
3										
4										
5	County	Estimated Eligible			Total Participants			Penetration Rate		
6		Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	11,475	14	11,489	10,861	16	10,877	94.65%	113.05%	94.67%
8	Imperial	0	17,814	17,814	1	15,200	15,201	N/A	85.33%	85.33%
9	Kern	11,865	28,857	40,722	10,816	27,456	38,272	91.16%	95.14%	93.98%
10	Kings	13	14,873	14,886	17	13,846	13,863	126.16%	93.09%	93.12%
11	Los Angeles	926,411	2,429	928,840	825,099	1,015	826,114	89.06%	41.79%	88.94%
12	Orange	213,412	10	213,423	149,057	16	149,073	69.84%	156.03%	69.85%
13	Riverside	112,916	128,274	241,191	90,416	114,008	204,424	80.07%	88.88%	84.76%
14	San Bernardino	171,065	1,107	172,173	160,456	841	161,297	93.80%	75.96%	93.68%
15	San Luis Obispo	8,854	16,592	25,446	3,488	10,790	14,278	39.40%	65.03%	56.11%
16	Santa Barbara	38,726	1,495	40,221	26,158	520	26,678	67.55%	34.78%	66.33%
17	Tulare	11,144	46,601	57,745	11,364	47,198	58,562	101.97%	101.28%	101.41%
18	Ventura	53,854	1,646	55,500	44,113	1,374	45,487	81.91%	83.48%	81.96%
19	Total	1,559,738	259,714	1,819,451	1,331,846	232,280	1,564,126	85.39%	89.44%	85.97%
20										
21	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									

	A	B	C	D	E	F	G	H	I
1	PY 2017 CARE Annual Report								
2	CARE Table 7								
3	CARE Capitation Contractors								
4	SOUTHERN CALIFORNIA GAS COMPANY								
5	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
6		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
7	Community Action Partnership of Orange County		X	X	X	0	0	0	\$ -
8	ELA Communications Energy ED Program		X			0	0	0	\$ -
9	PACE – Pacific Asian Consortium in Employment		X	X	X	0	0	0	\$ -
10	Proteus, Inc.		X			0	0	0	\$ -
11	Community Pantry of Hemet		X			0	0	0	\$ -
12	Community Action Partnership of San Bernardino		X		X	0	0	0	\$ -
13	LA Works		X			0	0	0	\$ -
14	Children’s Hospital of Orange County		X			0	0	0	\$ -
15	All Peoples Christian Center		X			0	0	0	\$ -
16	LA County 211		X			0	0	0	\$ -
17	YMCA Montebello-Commerce		X			0	0	0	\$ -
18	Sr. Citizens Emergency Fund I.V., Inc.		X			0	0	0	\$ -
19	Coachella Valley Housing Coalition		X			0	0	0	\$ -
20	HABBM		X			0	0	0	\$ -
21	Second Harvest Food Bank of Orange County		X			0	0	0	\$ -
22	Southeast Community Development Corp.		X			0	0	0	\$ -
23	Latino Resource Organization		X			0	0	0	\$ -
24	Independent Living Center of Southern California		X			0	0	0	\$ -
25	Community Action Partnership - Kern County		X			0	0	0	\$ -
26	El Concilio del Condado de Ventura		X			0	0	0	\$ -
27	Ventura Cty Comm Human		X			0	0	0	\$ -
28	Blessed Sacrament Church		X			0	0	0	\$ -
29	Asian-American Resource Center		X			0	0	0	\$ -
30	Hermanidad Mexicana		X			0	0	0	\$ -
31	CSET		X			0	0	0	\$ -
32	Crest Forest Family and Community Service		X			0	0	0	\$ -
33	CUI – Campesinos Unidos, Inc.		X	X	X	0	0	0	\$ -
34	Veterans in Community Service		X	X	X	0	0	0	\$ -
35	Chinatown Service Center		X			0	0	0	\$ -
36	Koreatown Youth and Community Center		X			0	0	0	\$ -
37	MEND		X			0	0	0	\$ -
38	Armenian Relief Society		X			0	0	0	\$ -
39	Catholic Charities of LA – Brownson House		X			0	0	0	\$ -
40	Delhi Center		X			0	0	0	\$ -
41	OCCC, Inc. (Orange County Community Center)		X			0	0	0	\$ -
42	Green Light Shipping	X				0	0	0	\$ -
43	APAC Service Center		X			0	11	11	\$ 220
44	Visalia Emergency Aid Council		X			0	0	0	\$ -
45	Total Enrollments and Expenditures					0	11	11	\$ 220
46									
47	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
48	² Enrollments reflect new enrollments only.								

	A	B	C	D	E	F	G	H
1	PY 2017 CARE Annual Report CARE Table 8 CARE Participants as of Month-End SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5		Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change ^{1, 2}
6	January	N/A	1,566,972	N/A	1,566,972	1,814,442	86.36%	-0.23%
7	February	N/A	1,561,944	N/A	1,561,944	1,814,442	86.08%	-0.32%
8	March	N/A	1,560,389	N/A	1,560,389	1,814,442	86.00%	-0.10%
9	April	N/A	1,567,144	N/A	1,567,144	1,818,305	86.19%	0.43%
10	May	N/A	1,568,026	N/A	1,568,026	1,818,305	86.24%	0.06%
11	June	N/A	1,565,776	N/A	1,565,776	1,818,305	86.11%	-0.14%
12	July	N/A	1,560,691	N/A	1,560,691	1,817,692	85.86%	-0.33%
13	August	N/A	1,557,155	N/A	1,557,155	1,817,692	85.67%	-0.23%
14	September	N/A	1,556,511	N/A	1,556,511	1,817,692	85.63%	-0.04%
15	October	N/A	1,557,184	N/A	1,557,184	1,819,451	85.59%	0.04%
16	November	N/A	1,560,730	N/A	1,560,730	1,819,451	85.78%	0.23%
17	December	N/A	1,564,126	N/A	1,564,126	1,819,451	85.97%	0.22%
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 2017.							

	A	B	C	D
1	PY 2017 CARE Annual Report CARE Table 9 CARE Average Monthly Usage & Bill SOUTHERN CALIFORNIA GAS COMPANY			
2				
3				
4				
5	Average Monthly Gas / Electric Usage Residential Non-CARE vs. CARE Customers			
6				
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	24.84	9.90	34.74
10	CARE	20.94	5.29	26.23
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2 and Above	
13	Non-CARE	N/A	N/A	N/A
14	CARE	N/A	N/A	N/A
15				
16				
17	Average Monthly Gas / Electric Bill Residential Non-CARE vs. CARE Customers¹ (Dollars per Customer)			
18				
19				
20	Customer	Gas	Electric	
21	Non-CARE	\$38.62	N/A	
22	CARE	\$29.65	N/A	
23				
24	¹ Excludes master-meter usage.			

¹ Excludes master-meter usage.

	A	B	C	D	E	F
1	PY 2017 CARE Annual Report CARE Table 10 CARE Surcharge & Revenue SOUTHERN CALIFORNIA GAS COMPANY Electric CARE Surcharge and Revenue Collected by Customer Class					
2						
3						
4						
5						
6						
7	Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
8	Residential	N/A	N/A	N/A	N/A	N/A
9	Commercial	N/A	N/A	N/A	N/A	N/A
10	Agricultural	N/A	N/A	N/A	N/A	N/A
11	Large/Indust	N/A	N/A	N/A	N/A	N/A
12	GAS CARE Surcharge and Revenue Collected by Customer Class					
13						
14						
15						
16						
17						
18	Customer	Average Monthly		CARE	Total CARE	Percentage of
19	Class	CARE Surcharge¹	Monthly Bill	Surcharge Bill	Surcharge Collected	CARE Surcharge Revenue Collected
20	Residential	\$0.89	\$38.62	2.30%	\$42,962,187	41.60%
21	Commercial	\$11.54	\$242.69	4.76%	\$26,001,716	25.17%
22	Natural Gas Vehicle	\$683.05	\$9,270.53	7.37%	\$3,709,657	3.59%
23	Industrial	\$153.87	\$816.67	18.84%	\$30,613,286	29.64%
24						
25						

¹ Excludes CARE customers.

	A	B	C	D	E	F
1	PY 2017 CARE Annual Report					
2	CARE Table 11					
3	CARE Capitation Applications¹					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	Entity	Total Received	Approved²	Denied	Pending/ Never Completed	Duplicate
6	Orange County CDC	0	0	0	0	0
7	ELA Communications	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Proteus	0	0	0	0	0
10	Cmty Pantry of Hemet	0	0	0	0	0
11	Cmty Svcs SBDO County	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	New Beginning Outrch Inc	0	0	0	0	0
14	Sr Citizen Emergency Fund	0	0	0	0	0
15	HABBM	0	0	0	0	0
16	2nd Harvest Food Bank OC	0	0	0	0	0
17	Latino Resrce Organizatn	0	0	0	0	0
18	Indepnt Living Center So Cal.	0	0	0	0	0
19	SoEast Comm Dev Corp	0	0	0	0	0
20	El Concilio - Ventura	0	0	0	0	0
21	Blessed Sacrament Church	0	0	0	0	0
22	Hermanidad Mexicana	0	0	0	0	0
23	Crest Forest Family Cmty	0	0	0	0	0
24	Campeños Unidos, Inc.	0	0	0	0	0
25	Chinatown Svce Center	0	0	0	0	0
26	Meet Ea Need W / Dignity	0	0	0	0	0
27	Armenian Relief Society	0	0	0	0	0
28	Cath Char Bronson House	0	0	0	0	0
29	CSET	0	0	0	0	0
30	Orange County Comm Ctr (OCCC)	0	0	0	0	0
31	Delhi Center	1	0	0	0	1
32	Koreatown Youth and Comm Ctr	0	0	0	0	0
33	Apac Service Center	27	11	0	1	15
34	Visalia Emergency Aid Council	0	0	0	0	0
35	The Companion Line	0	0	0	0	0
36	Across Amer Foun	0	0	0	0	0
37	All Peoples Christian	0	0	0	0	0
38	LA Works	0	0	0	0	0
39	LA County 211	0	0	0	0	0
40	Coachella Valley Housing Coalition	0	0	0	0	0
41	Total	28	11	0	1	16
42						
43	¹ Includes sub-metered customers.					
44	² Includes new enrollments and recertification applications approved.					

	A	B	C	D	E	F	G
1	<div>PY 2017 CARE Annual Report</div> <div>CARE Table 12</div> <div>CARE Expansion Program</div> <div>SOUTHERN CALIFORNIA GAS COMPANY</div> <div>Participating Facilities by Month</div>						
2							
3							
4							
5							
6	2017	Gas			Electric		
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
8	January	6	1,099	1,105	N/A	N/A	N/A
9	February	6	1,081	1,087	N/A	N/A	N/A
10	March	6	1,036	1,042	N/A	N/A	N/A
11	April	6	1,047	1,053	N/A	N/A	N/A
12	May	6	1,052	1,058	N/A	N/A	N/A
13	June	6	1,076	1,082	N/A	N/A	N/A
14	July	6	1,076	1,082	N/A	N/A	N/A
15	August	6	1,082	1,088	N/A	N/A	N/A
16	September	6	1,092	1,098	N/A	N/A	N/A
17	October	6	1,092	1,098	N/A	N/A	N/A
18	November	6	1,093	1,099	N/A	N/A	N/A
19	December	6	1,123	1,129	N/A	N/A	N/A
20	<div>Average Monthly Gas / Electric Usage¹</div>						
21							
22							
23	Customer	Gas	Electric				
24		Therms	KWh				
25	Residential Facilities	26.23	N/A				
26	Commercial Facilities	185.81	N/A				
27	<div>CARE Expansion Self-Certification and Self-Recertification Applications</div>						
28							
29							
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	1,294	1,064	8	36	0	
32	Percentage		82.23%	0.62%	2.78%	0.00%	
33							
34	¹ Excludes master meter usage.						

¹ Excludes master meter usage.

PY 2017 CARE Annual Report
CARE Table 13A
CARE Customer Usage and ESA Program Treatment

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

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

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

	A	B
1	PY 2017 CARE Annual Report CARE Table 14 Categorical Enrollment SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5	Type of Enrollment	Number of Customer Enrollments¹
6	Bureau of Indian Affairs General Assistance	225
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	46,395
8	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	12,804
9	Head Start Income Eligible - (Tribal Only)	951
10	Healthy Families A&B	19,032
11	Low-income Home Energy Assistance Program (LIHEAP)	8,749
12	Medicaid/Medi-Cal	100,574
13	National School Lunch Program (NSLP) - Free Lunch	31,259
14	Supplemental Security Income (SSI)	14,831
15	Tribal TANF ²	N/A
16	Women, Infants, and Children Program (WIC)	31,234
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
18		
19		